EDC Client 5.13 User Manual

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1 Welcome

1.1 Introduction

Welcome to DocuData's ***EDC*** software, the complete solution to record management.

The ***EDC*** software, client version, was created to control, from the workstation, the inventory of in-house and off-site boxes and files.

There are several editions of ***EDC***, each of them takes care of various record management aspects. Following is a brief description of the different editions and the icons representing them :

Semi-active, boxes only edition (SB): allows the management of boxes that are stored at an off-site record center.

Semi-active edition (SBF): includes the "semi-active, boxes only" edition and also allows the management of files that are stored at an off-site record center.

Active edition (SA) : includes the "semi-active" edition and also allows the management of internal documents.

Imaging edition (SAI): includes the "active" edition and allows the scanning of documents as well as the management of all sorts of documents.
EDM edition (SAE) : includes the "imaging" edition and allows the management, the tracking, the identification and the retrieval of all documents in electronic form.

Summary description of tasks performed by the editions of *EDC* :

Semi-active, boxes only edition (SB)

- search, view, print and edit semi-active box inventory 86 even if off-site record center does not use ***EDC***
- search, view, print, create and edit orders for boxes 201
- order and manage non track files 211
- add boxes 86 to semi-active (off-site) inventory
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Semi-active edition (SBF)

All the functions of the ***Semi-active, boxes only*** edition plus the complete management of semi-active files 229.

Active edition (SA)

All the functions of the ***Semi-active*** edition plus the following :

- manage storage locations 147 for boxes and files
- manage the internal circulation of documents 194
- create disposal and transfer lists 154 for active documents
- transfer active files in boxes 157
- transfer active documents to an off site record center 157
- full text indexing
- full text search

Imaging edition (SAI)

All the functions of the ***Active*** edition plus the following :

- scan and manage images 115
- store images at an off-site electronic vault
- store images on-site (on removable CD's or large system of files)
- perform OCR (Optical Character Recognition)
- index images by zone

EDM edition (SAE)

All the functions of the ***Imaging*** edition plus the following :

- manage, track, identify and retrieve all types of electronic documents.

EDC Client versions

	SB	SBF	SA	SAI	SAE
Identify, track, store, retrieve and manage storage **boxes** at an offsite Record Center	X	X	X	X	X
Assign and print individual intelligent bar code labelsfor **boxes**, to identify their contents.	X	X	X	X	X
Perform full text searches to help locate **boxes**	X	X	X	X	X
Establish retention calendars by **box** type	X	X	X	X	X
Track everything using SQL reports	X	X	X	X	X
Full indexing of all items, including Boolean and full text searches	X	X	X	X	X
Identify, track, store, retrieve and manage storage **files** at an offsite Record Center		X	X	X	X
Additional 20 user-definable fields with an optional dropdown list for **files**		X	X	X	X
Subdivide boxes into as many indivdual **files** as desired, each with its own retention calendar.		X	X	X	X
Manage and track all items both **in-house** and semi-active files and boxes			X	X	X
Dual retention calendars for active **in-house** and semi-active files and boxes			X	X	X
Circulation, inventory management, destruction and transfer lists of all **in-house** files and boxes			X	X	X
Scan files into an image format				X	X
Identify, track, store, retrieve and manage documents right down to the individual page				X	X
Manage, track, identify and retrieve documents in electronic form					X

For further information about the client version of the ***EDC*** software and its different editions,

consult the web site at www.docudatasoft.com.

1.2 Quick start

EDC was just installed and it is now time to explore this new environment. The goal of this guided tour is to establish first contact with ***EDC*** software. It should take about 15 minutes.

During this exercise we will find the information related to box number 0105.

Upon completion, the user will be able to :

- identify his or herself within the system
- navigate within the application
- perform a search

Before starting, the computer must be open and running a Windows™ session. It will also be necessary to enter a user's name and a password (optional).

Guided Tour

1 Locate the ***EDC*** icon and double-click on it with the left mouse button.
2 Select a user's name and press **OK**.
3 Enter a password and press **OK**. The *Main window* appears.
4 The *Box* module is located under the *Inventory* tab. With the mouse, click on this tab and on the button of the *Box* module.
5 If an inventory has already been entered, the content of a box is displayed. If not, only the *Edit* menu is available to add new boxes. We will suppose that at least one box has been entered in the inventory. We will look for box number 0105 (or any other box number in the inventory).
6 Click on **Find**->**Find** or on the **Find** button  . The search index is set by default to *Box Number*. We will see later how to perform a search 20 with a different search index.
7 The cursor is on the *Number* field.
8 Enter **0105** (or any other box number in the inventory).
9 Press **Ctrl-Enter** or click on the **Accept** button to start the search. The computer initiates the search and displays the most similar item found.
10 It is now possible to consult all the wanted information and to display or print a report through the *File* menu. For now, we are finished and we will leave the module.
11 Click on **File**->**Exit** to return to the *Main window*.

Note : Every menu item has an underlined letter for direct access without using the arrows or the mouse. A menu can be activated by pressing simultaneously *Alt* key and the underlined letter. For example, to activate the *File* menu simply press **Alt-F**.
Inside this menu, menu items and sub-menu items also have underlined letters. When pressing these letters without *Alt* it is possible to activate the action. Then to exit the module and go back to the *Main window* simply press **Ctrl+Bksp**.

The Guided Tour is now completed. Many of the operations learned here will be needed to use software.

1.3 Conventions

Access path

The convention **First item**->**Second item** will be used to represent the route needed to access a command.
If we indicate that to modify a note it is necessary to click on **Box**->**Edit**->**Notes**, this means that

the *Box* module must be open and in this module there is a menu *Edit* and the item to be chosen within this menu is *Notes*. **File**->**View Report**->**On Type**->**Department** means that it is necessary to open the *File* menu, select the *View report* menu item, select *On type* and select *Department*. In some cases, the path will be expressed in the following way : **File**->**View report|Print report**. This means that there is the possibility to choose from either *View report* or *Print report* from the *File* menu.

Keyboard Shortcuts

Keyboard shortcuts 18 are expressed in the following manner : **Ctrl-X**. They are used as follows.

1 Press on the first key (**Ctrl**) and hold it.
2 Press on the second key (**X**).
3 Release keys.

Terminology

Certain words will often be used when explaining a process. When the word *section* is used in the procedures, it refers to the tab from the main window. When the word *module* is used, it refers to the icon from the main window.

1.4 How to use this help file

Structure

In order to understand the content of this instruction manual, you should learn to use it efficiently. So before you start reading along, let's see the structure of this help file.

Main chapters

Chapters like *System Overview* or *Record Center Management*, are delimited by a title page. Usually the first topic is an outline of the chapter's content. Main chapters are made up of sub-chapters.

Sub-chapters

Chapters like *Employee* or *Box and File* are usually made of topics. In most cases, the first topic is a general overview of the module. All the sub-chapters that constitute the chapters called *EDC Software Management, Corporate Information Management*, *Inventory Management* and *Order Processing* are modules from ***EDC Client***.

Topics

Topics are the main component of this help file, usually they describe an action that can be performed or a way of proceeding. Topics called *Fields* are some of the most important topics of the manual since they give a description and/or a definition of the different fields contained in the window of a module.

Useful chapters

After seeing the structure of the help file, we can now concentrate on the chapters that are especially useful for understanding the software. Here is a description of a few of them:

Appendix

This chapter includes graphics of different workflows, a list of related EDC applications and a list of activity codes that are useful when creating reports.

Glossary

This chapter includes a few useful definitions of terms used in the software, as well as a page reference for each term.

Using keywords

Depending on which type of help file you are consulting, the use of keywords will be different.

Printed version

In the case of the printed version, the *Glossary* will be the main reference for keywords. The glossary is in alphabetical order and gives a reference page for each term.

Adobe PDF file

In the case of the PDF version, the *Glossary* will be the main reference for keywords. The search engine particular to *Acrobat Reader* may also be a good way to find the desired topics.

Winhelp

In the case of Winhelp, the *Index* or even the *Find* tab will enable you to look for desired keywords and find their related topics. The *Glossary* will also be available, but the keyword search is often more efficient.

2 General concepts

2.1 Elements of a typical window

Title bar
The title bar indicates the name of the window. Every module appears in its own window.

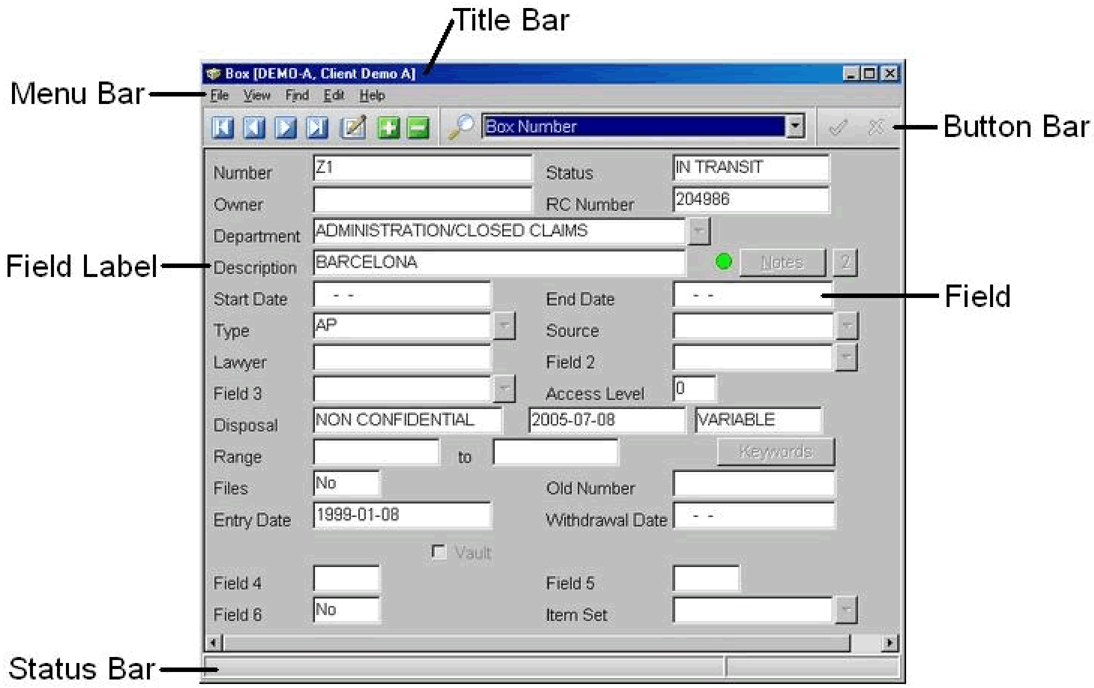
Menu bar
The menu bar allows to activate the software's operations. Every word represents a menu. A menu gives access to various menu or submenu items and appears in drop-down lists.

Button bar
Buttons provide rapid access to certain functions. Simply click on a button to start its action.

Status bar
The status bar displays relevant information for the current operation.

Field label
The fields are usually preceded on the left by a label describing their content.

Field
A field is a location on an entry form which displays specific information. Some fields may be modified, others are only displayed for consultation. A field is generally preceded by a label except when its content gives no possible doubt.



2.2 How to use the menus

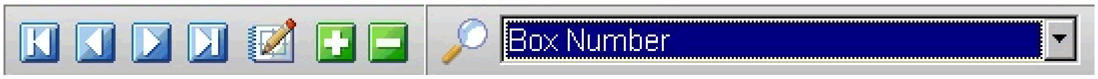
There are three ways to use menus : navigate with the mouse, use shortcut keys or press the *Alt* key.

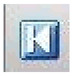
Mouse
The easiest way to navigate is to use the left mouse button to select a menu and then choose a menu item from the drop-down list that appears

Shortcut keys
The second way is used only with certain menu items. Notice, for example, that Ctrl-S is written to the right of the *Scroll* menu item from the *Find* menu. This is a keyboard shortcut. By pressing the **Ctrl** and the **S** keys simultaneously, the scroll command will start if that operation is available from the present location.

"Alt" key
Before using the third way, notice that every menu or menu item has an underlined letter. For example the *F* from the *Find* menu is underlined. Pressing *Alt* and *F* (noted as *Alt-F*) on the keyboard will open the *Find* menu. Same operation inside a menu; but this time, simply pressing the underlined letter without the *Alt* key will activate the desired menu item. From this point, the navigation keys from the keyboard can also be used to select the menu item and press *Enter* to start the action.

2.3 Button bar



 **First** Go to the first record.

 **Previous** Go to the previous record.

 **Next** Go to the next record.

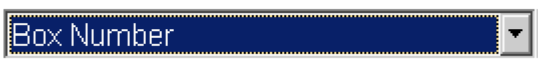
 **Last** Go to the last record.

 **Edit** Modify the current record.

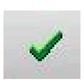
 **Add** Add a record.

 **Delete** Erase the current record.

 **Find** Search for a record.



Search Index Choose a search index.

 **Accept** Accept an action.

 **Cancel** Cancel an action.

2.4 Navigation shortcuts

Up-Arrow	Go to the previous line
Down-Arrow	Go to the next line
Left-Arrow	Scroll to the left
Right-Arrow	Scroll to the right
Shift-Tab	Move to the previous control or field
Tab	Move to the next control or field
Page up	Scroll one page up
Page down	Scroll one page down

<u>In an entry form</u>

Shift-Tab	Go to the previous field
Tab	Go to the next field
Home	Go to the first record In an edition mode, it moves the cursor to the beginning of the field

End	Go to the last record In an edition mode, it moves the cursor to the end of the field
Page up	Go to the next record
Page down	Go to the previous record

2.5 Common keyboard shortcuts

Alt-F4	Exit the program or the module
Ctrl-Bksp	Return to the *Main window*
Ctrl-E	Edit displayed information. The menu will not be available during editing. Changes can be accepted with **Ctrl-Enter** or canceled with **Esc**
Ctrl-Enter	Accept the information of an entry form
Ctrl-F	Find information
Ctrl-K	View and change the search index
Ctrl-N	Edit notes
Ctrl-S	Scroll
Shift-F7	Select the printer and its options
F1	Contextual help
F3	View history
F8	Search with bar codes
Del	Delete an item
Enter	Terminate selection. The choice corresponds to the selected information. In an edit mode, it is the same action as **Tab**
Esc	Cancel a selection, close a menu or close a submenu
Ins	Add item
Space	Mark the highlighted item in multiple selection lists. This key is efficient only for multiple selection choices (when entering a box order for example)

In BOX module

F7	Print thermal labels (also in other modules)
Ctrl-N	Adding notes
F5	Editing the alternate label
F2	View files within a box
F3	View the history
F4	View the notes

In FILE module

Ctrl-I	Open the imaging module
F3	View the history
F4	View the notes
F6	View the last order

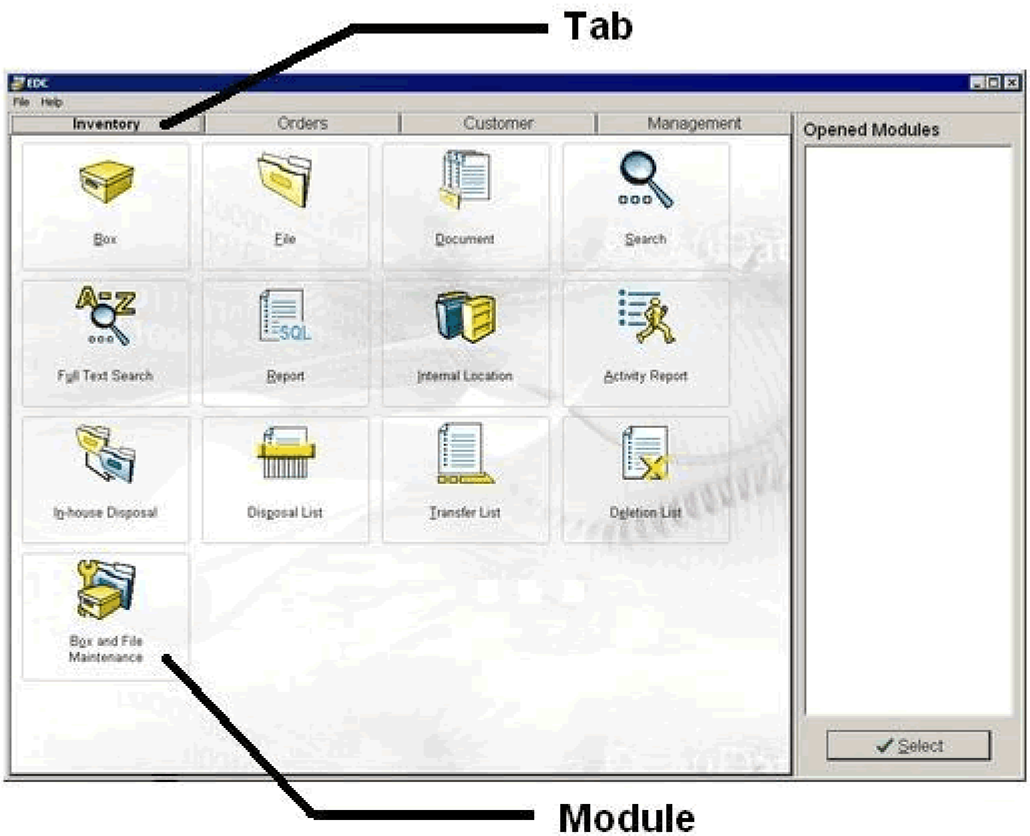
In DISPOSAL | TRANSFER | DELETION list modules

F2	View items within a list

Note : Some keyboard shortcuts are only available in relevant modules. For example, **Ctrl-I** only appears in the *File* module because imaging is completely performed and managed from it.

2.6 Opening a module

The *Main window* is the heart of the program; it is where all actions are initiated from.

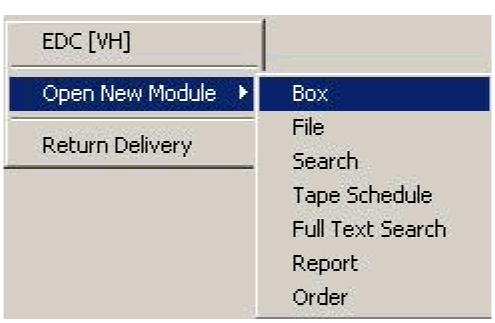


For opening a module it is necessary to :

1 Know what module is needed.
2 Select the appropriated tab by clicking on it with the left mouse button.
3 Click on the wanted module.

2.7 Using several modules simultaneously

1 Open the first module in the usual way 19 (see the previous section).
2 Once in the module, press **Ctrl-Bksp** or click on the right mouse button. Some menus appear.



Select **EDC** to leave a module (without closing this module) and to go back to the *Main window*.

3 Open the second module the usual way.
4 To go back to the first module, click again on the right mouse button. Some menus appear as in step **2**. Select the module wanted in the drop-down list or press **Ctrl-Bksp** and select the desired module in the list of opened modules from the *Main window*.

Note : In the example above, the opened modules are shown on the bottom, as *File*, *Order* and *Return Delivery*. The system allows to open directly the common modules by clicking on **Open New Module** and by selecting a module in the drop-down list as **Box**, **File**, **Search** or **Order**.

2.8 Exiting a module or the program

Exiting a module

The action for exiting a module is the same in all modules : press **Alt-F4** keys or click on **File**-> **Exit**.

Exiting the program

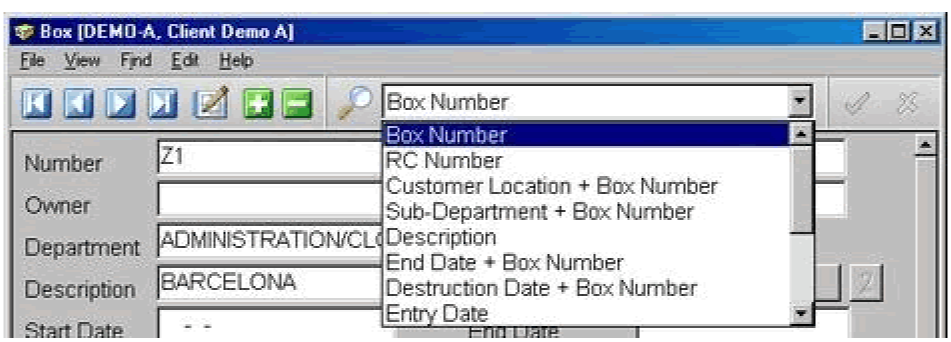
To exit the program click on **File**->**Exit** or press **Alt-F4** from the *Main window*.

If several modules are still opened or if an action is still in progress, a dialog box will appear to end actions and approve the closing.

2.9 Performing a search

The searches are generally the same for all modules.

1 Define the information you want to look for.
2 Access the appropriate module (access the *Department* module to find a department, the *File* module to find a file, etc.).
3 Choose a search index by pressing the **Ctrl-K** keys, using the **Up-Arrow** key and the **Down-arrow** key or by clicking on the search index button to drop down the list as follows and scroll with the cursor :



4 Initiate the find operation by using the **Find** button , or by clicking on **Find**->**Find** or pressing **Ctrl-F** keys.

Note : A dialog box is displayed to enter the customer concerned by the search when it is indicated in the chosen search index

5 If so necessary, enter the customer's code and click on the **Accept** button. The module becomes active (all fields are blank except the selected field which is available to enter information) or related dialog boxes appear.
6 Enter the appropriate information in the fields or boxes.
7 Perform the find operation by clicking on the **Accept** button of the module or on the dialog boxes or press the **Ctrl-Enter** keys.

2.10 Using reports

Most modules have their reports available from the *File* menu. All reports may either be printed or viewed on screen.

The **File**->**Print Setup** operation may be used to select the target printer and the paper source. The other printer settings are optimized by the software and cannot be modified. If no specific printer is selected before an action, the program uses the Windows default printer.

When a report is displayed, click on the **Print setup** button  to set the printer settings or click on the **Print** button  to print the report.

Note : The zoom option only affects the display, and not the printed copy.

2.11 Using lists

A list allows to display and scroll rapidly a group of related items such as files or boxes to have a brief overview of their content and to interactively select one or more items from the list (the information is often incomplete when items are displayed on a list).

Each module has a list available which scrolls the records starting from the current record. This action is activated with the **Find**->**Scroll** operation (**Ctrl-S**). For example, pressing **Ctrl-S** in the *File* module will show the files in a list fashion, with one file on each line, starting from the current file selected.

When a list is active, a selection bar is displayed on one of the items; this is the list cursor. To select a particular item, use the navigation shortcuts 17 followed by the *Enter* key or use the mouse. In multiple selection lists, several items can be selected by pressing the space bar or double-clicking on them. The selected items will appear highlighted.

In the scroll operation discussed above, when a record is selected it is this new record that will be displayed on the screen. For example, to see the details on box 0105 (or any other box in the inventory), simply scroll the boxes by pressing **Ctrl-S** in the *Boxes* module, find the 0105 box with the navigation keys and press **Enter** after selecting the item. The box 0105 is now displayed in the module's entry form and its details can be viewed.

2.12 Editing the information of an entry form

When an entry form is displayed on the screen, it cannot be modified. It is displayed in the "browse" mode by default. This means that the information may be viewed but cannot be edited directly. To perform operations such as adding, editing or deleting, they must be initiated through the *Edit* menu or the button bar.

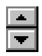
While editing an entry form, the menu bar is inactive until the data entry operation is completed. It is possible to navigate in the entry form by clicking on **Tab** and **Shift-Tab** keys or using the mouse.

To accept the modifications in an entry form press **Ctrl-Enter** keys or click on the **Accept** button. To cancel the modifications press the **Esc** key or click on the **Cancel** button.

2.13 Field types

There are three main types of data entry fields : alphanumeric or numeric fields, choice fields and drop-down fields.

Alphanumeric or numeric fields
The most common fields of all. Simply type the required information in the field. A numeric field can contain only numbers, while an alphanumeric field may contain both numbers and letters.

Choice fields 
Only a limited set of choices may be entered in the field. Press the space bar or one of the arrows next to the field to select the next possible value.

Drop-down fields 
These fields are like numeric and alphanumeric fields, but only values located in the list may be entered in these fields. If the information entered in the field is not on the list, then a selection list is displayed (starting with the entered character) to select the value. The list is accessible by clicking on the button located to the right of the field (see the icon above).

3 System overview

3.1 General Outline

Software installation is quite simple but system implantation and management is more complicated. Before installation, a complete analysis of the organization is necessary. To be efficient, the software must be the virtual transposition of the organization.

The subsequent sections will give a few notions about archiving, while describing the installation, the implementation and the management of the system. They will also help define certain tasks related to inventory and ordering.

3.2 General concepts of off-site record management

The goal of a record center is to efficiently manage documents for an organization while maintaining control over them. When sending semi-active (less frequently used) records to an off-site record center, the internal storage space can be kept for frequently used records. An off-site record center allows the organization to retain control over documents and to lower storage costs. When a document is needed, it could simply be ordered from the off-site record center and be delivered shortly after.

For an efficient management of off-site records, a solid basis is required to provide complete control over the inventory. One of the skills that guaranties this efficiency, is a telephone or internet link between the organization and the off-site record center. This link automatically updates the inventory and assures a very efficient ordering system in which the state of every box and file is accurately available at any moment.

Access Management

Due to the variety of tasks related to record management, not all users have the same responsibility. Some users may be responsible for maintaining the inventory; others may only be

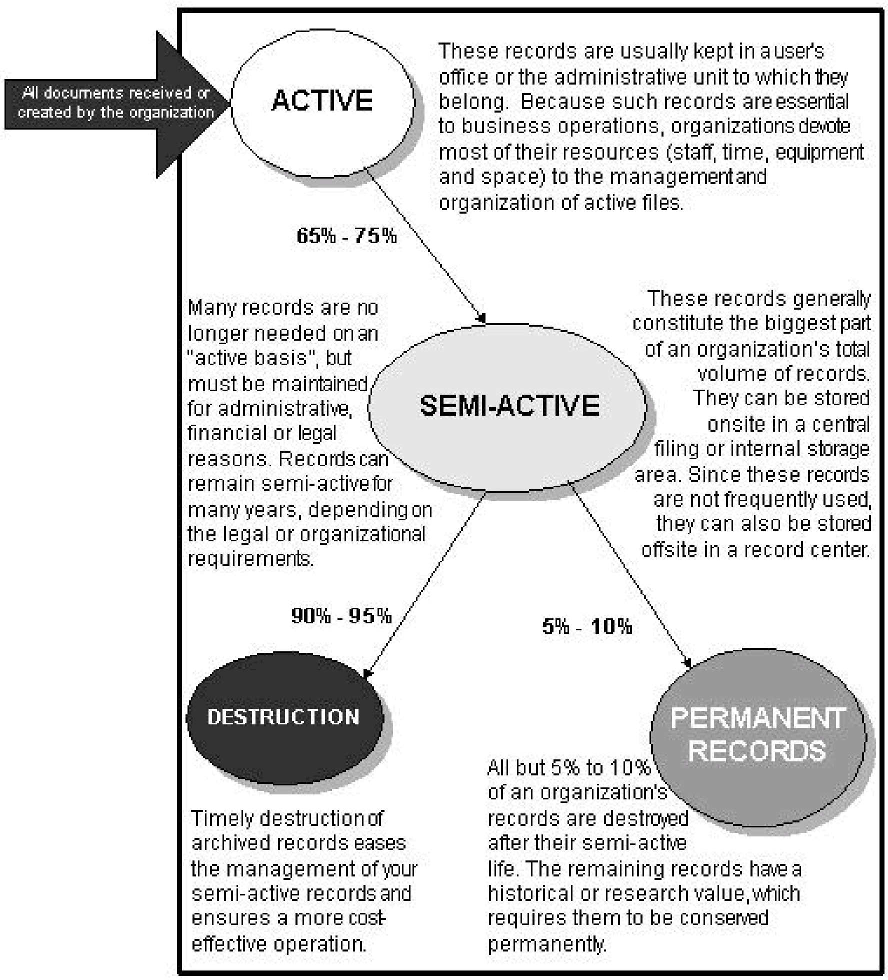
assigned to certain departments. In brief, the records management system must control the access to the information.

Orders and deliveries

The ordering system allows the retrieval of boxes and files from the off-site record center. Orders may be delivered to the customer according to its different preferences and priorities.

All orders being delivered at the same address and at the same time are grouped together as one delivery, reducing the labor and transport costs. For example, if three orders are entered the same afternoon, and they are to be delivered at the same address, they would be grouped together as one delivery; the retrieval and shipping costs for all files and boxes will be combined together.

Life Cycle of a Record



3.3 Setup and management of the system

When implementing the system, it is important to consider the internal management of the organization, its rules, its hierarchy, its document types and its internal locations. These multiple details are determined by the software's setup, since its major role is to support the management of the organization

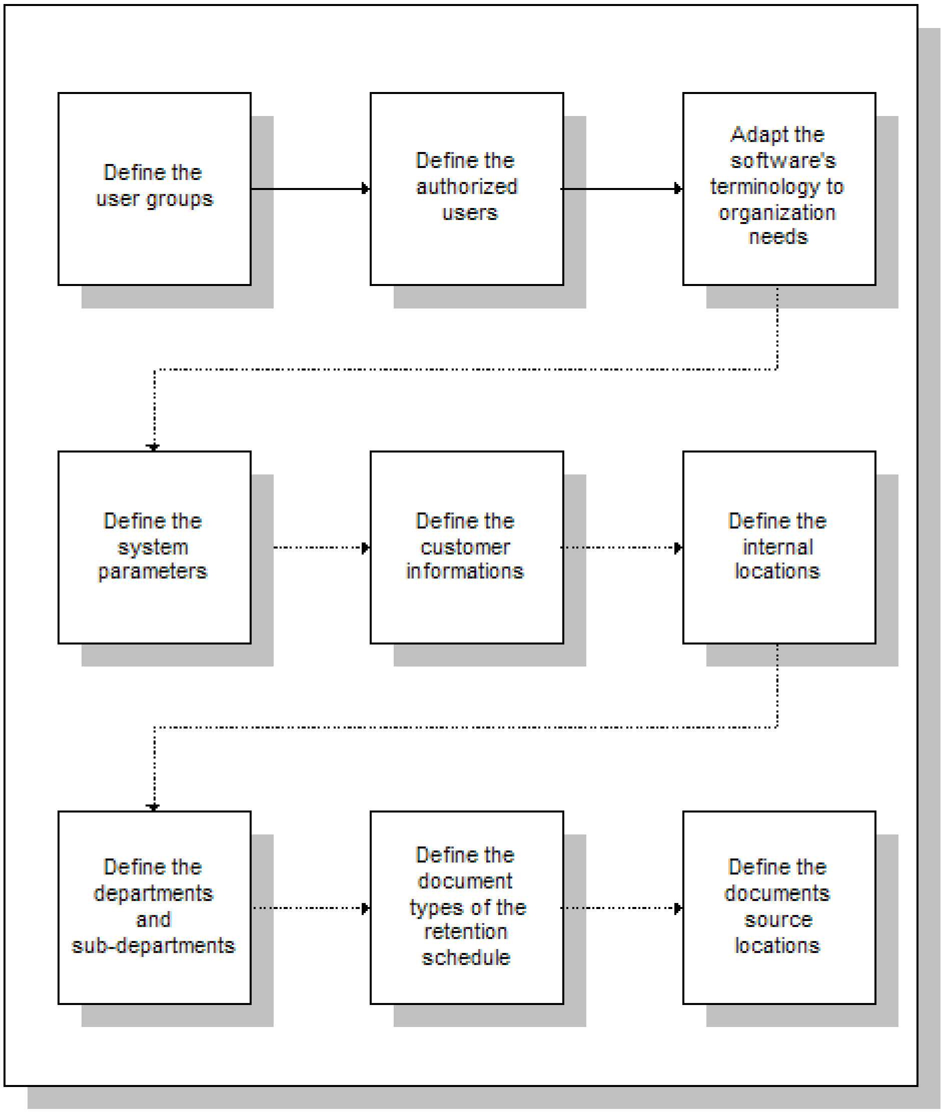
For example, employees within an organization may be granted different levels of responsibility, so it is logical that a record management software should reflect its structure. Employees who are responsible for the addition of boxes and files to the off-site inventory may not be allowed to create disposal lists. Similarly, the system information may only be viewed by a few users. The access to each module in the system must be controlled with respect to each user's module access rights. Users must be combined in groups, and access rights must then be assigned to the entire group.

In large organizations, departmental access control is very important, that is why each user of the system is given rights to specific departments. In fact, a user will not be able to order, add, or edit an item that belongs to a department for which he/she does not have rights to. A user can also be restricted to receive deliveries at one or more delivery addresses. These access control mechanisms allow to customize the working environment for each individual user and respect the access restrictions of modules, departments and delivery addresses.

All organizations use their own terms in accordance to their own activities and clients activities; that is why the software terminology should be modified consequently. Every action, every report, every list sorted from the system can then be read easily by any member of the organization.

In the same way, it is essential to clearly identify departments and sub-departments, document types, source locations, internal locations, etc.

The following scheme summarizes all parameters that should be defined in order to set up the system properly..



Legend : The boxes represent the procedures, the continuous arrows represent a requiered execution order, the dotted arrows represent a suggested order and the absence of arrows means that a procedure can be done in any order.

3.4 Tasks related to inventory

Inventory control is at the core of this record management system. That is why it is possible to determine at any given time the state of a document, its detailed information, and much more.

Here are some notions of off-site record management to explain the importance of software modules associated to the inventory :

Bar Code Labels

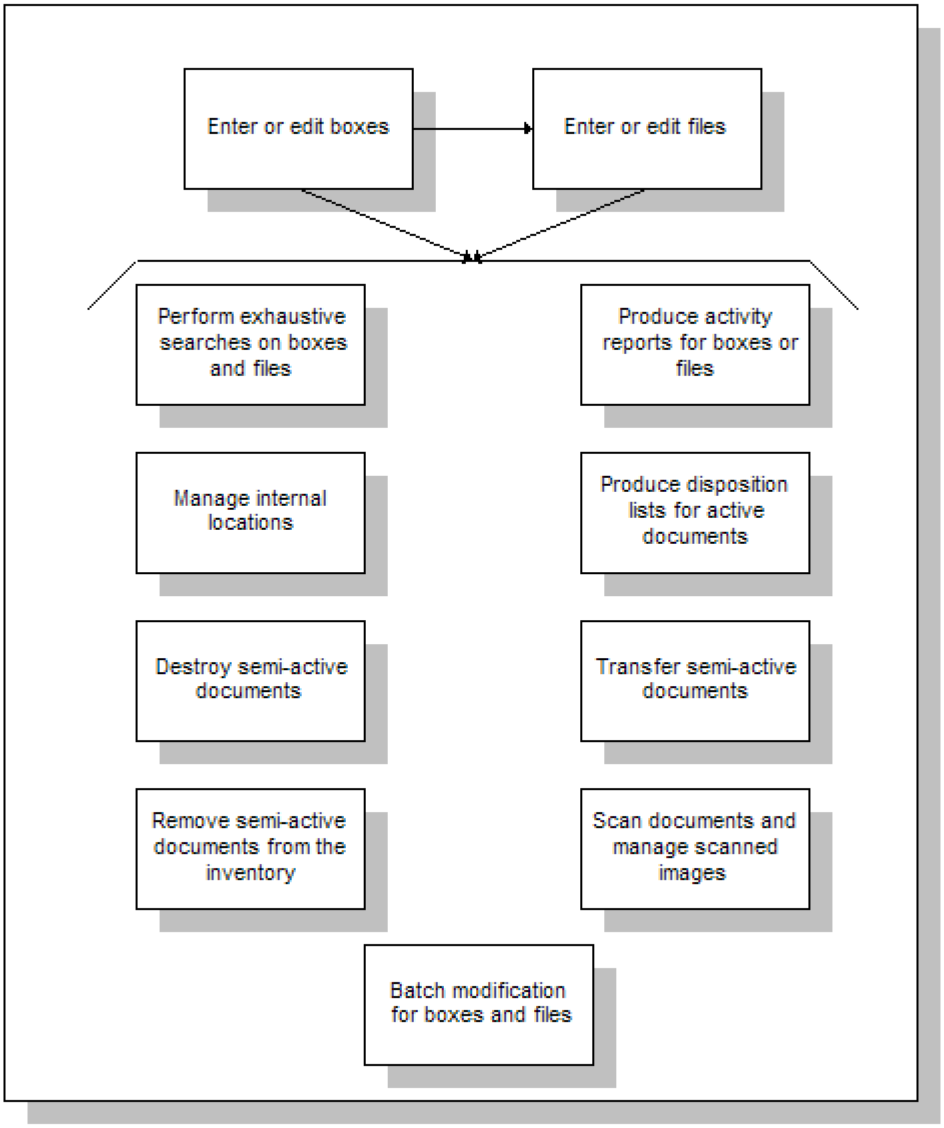
In order to track boxes and files accurately, each item is labeled with a bar code 229; this bar code is scanned with a bar code reader every time an item is delivered and returned to the off-site record center. To maintain the inventory on every box or file, the activity of each item is tracked individually in the history. With ***EDC,*** addition of new boxes and files to the off-site storage inventory can be done directly*;* while the labels are printed simultaneously.

Box Retention and Disposition

Removal of boxes from the inventory can also be necessary for various reasons, that is why the system allows the creation of disposal lists. After approval, the boxes will be treated according to the disposal mode (destruction, transfer, deletion, etc). Disposal lists can also be created manually, one item at a time. Boxes may be removed from inventory if they are transferred to another off-site storage facility or if they are simply not returned to the off-site center after having been ordered. The same treatment applies to a semi-active box or file that needs to be reactivated after being removed from the inventory. In that situation, the system allows the recovery of the history before the removal.

For archiving purposes, the disposal dates can either be calculated on a document type basis or on a departmental basis, depending on the organization conservation policy 229. Since each document type or department is associated to a certain retention period, boxes and files compute their disposal date according to the department or document type to which they belong. Finally, disposal dates are updated automatically when the retention of a document type or department is changed.

The principal tasks related to the inventory are described in the following scheme.



3.5 Tasks related to orders

The ordering system allows the retrieval of boxes and files from internal or off-site record centers. Orders may be delivered according to different preferences and priorities.

All orders being delivered at the same address at the same time are grouped together as one delivery, reducing labor and transport costs. For example, if three orders are entered in one afternoon for a delivery at the same address, they would be grouped together as one delivery; the retrieval and shipping costs for all files and boxes will be combined together.

3.6 Electronic management of documents

The ***EDC*** software, client version manages and controls the flow as well as the inventory of active and semi-active documents without maintaining a permanent electronic or internet link with the off-site record center. ***EDC*** does this by maintaining two copies of document information, one on-site and one at the off-site record center, that are periodically synchronized through a communication link. It is this link that allows the order of semi-active documents from the off-site record center.

When new information is entered or existing information is edited, the data stored at the off-site record center must be updated. Reciprocally, any changes made at the off-site record center must be returned to the organization's database. Here is an example illustrating the importance of the replication process: a box is ordered by a user; as soon as the box leaves the off-site record center to be delivered to the organization, its state is changed from IN to OUT; in order to control the flow of items, the organization's database must reflect the box's every movement.

When ordering a document from the off-site record center, ***EDC*** checks, using a communication link, the state of the concerned document to make sure it is available. This step is necessary since another user could have ordered the same document a few moments earlier, not leaving enough time for the software to update its state in the organization's database. Orders are then transmitted to the off-site record center using the ***EDC Client*** program.

Note : Any modification on a semi-active document triggers the updating and appears in the document's history 99.

In a network environment, the synchronization and order processes are the same as described above. The only difference is that these tasks are usually assigned to only one workstation.

3.7 States associated with the circulation of documents

Here is a description of possible document states during their circulation (consult the schematic representation following the descriptions) :

DELETED
The item has been deleted (which implies that the space for the item at the off-site record center is canceled and will not be billed for). Boxes are generally deleted because they will not be returning to the off-site center.

Note: Deleted semi-active items are not deleted from the computer system; they are only marked as DELETED, it is therefore possible to recover the history of deleted items by reactivating them.

DESTROYED
The item has been destroyed at the off-site record center.

DESTROYED (IN-HOUSE)
The item has been destroyed inside the organization.

IN
The item is at the off-site record center and is available for ordering.

IN (IN-HOUSE)
The item is present within the in-house inventory (active documents) and is available for ordering.

ON DELETION
The item is on a deletion list (cancellation of space). After the item is processed, its state will change to DELETED.

ON DESTRUCTION
The item is on a destruction list at the off-site record center. After the destruction of the item, its state will change to DESTROYED.

ON TRANSFER
The item is on a transfer list. After the transfer, its state will change to TRANSFERRED.

OUT
The item has been ordered from the off-site record center and has not been returned.

OUT (IN-HOUSE)
The item has been checked out of the in-house inventory (active documents) and has not been returned.

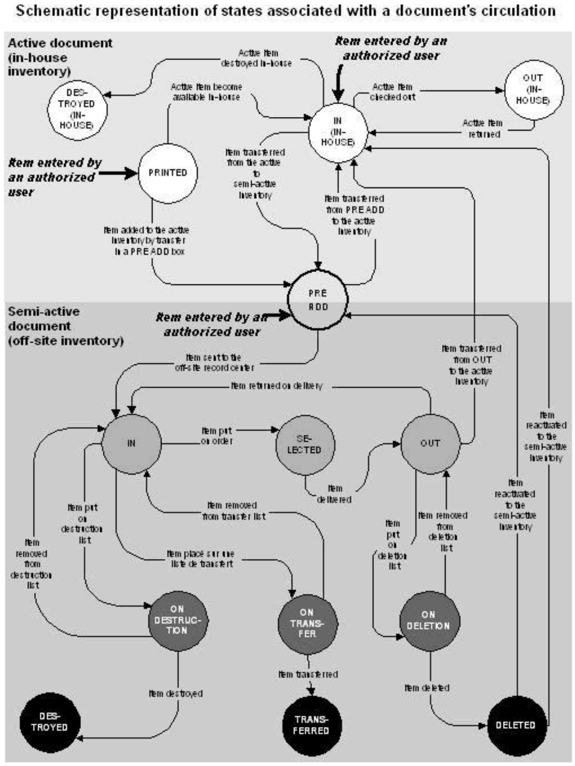
IN TRANSIT (or PRE ADD in older versions)
The item has been entered in the computer's inventory but has not been received at the off-site record center. The rent charges for items in IN TRANSIT are not billed. Once the items arrive at the off-site center their state is changed to IN and rent charges begin to take effect.

PRINTED (State effective only for files)
The item has been auto-created in the system and a bar code has been added in the inventory.

SELECTED
The item is currently selected for an order but has not yet been shipped.

TRANSFERRED
The item has been transferred to another storage center.

Schematic representation of states associated with a document's circulation



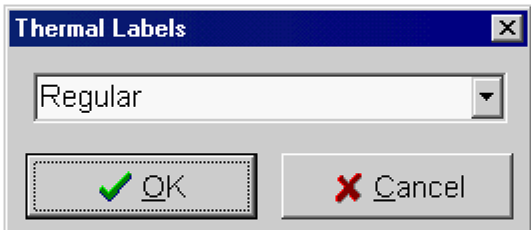
3.8 The main window

As mentioned before, the *Main window* is the heart of the program; it is where all actions are initiated. But also, its menus *File* and *Help* allow to view major system information and to set some options which will apply everywhere in ***EDC*** during the current session.
These menus are also available in every module of ***EDC***; they display or start the same operation

(except for *File->Exit*).

The *File* menu

- **Thermal Label Options** (Box or Files)
  This option opens a window which allows to choose a format when printing thermal labels for boxes or files.



It is only necessary to click on the drop-down button and to choose one of the available formats (Regular, Small, Very small). These formats are an internal part of the software.

Note : Two fields in the *System Information* module refer to these labels and allow to set the default format. The present operation only overrides these default formats for the current session. When ***EDC*** is closed and re-opened, the settings of the *System Information* module will apply again.

- ***Simple Interface**
  This option lets you simplify the interface in order to speed up the different processes in EDC. This is especially useful for people using Citrix.

- **Exit** (Alt+F4)
  This option allows to end the current session and to close ***EDC***. A similar option is present in every module but only closes the related module.

The *Help* menu

- **Contents**
  It opens the contents of the help file for ***EDC***. It is then possible to navigate within this file and to find any additional information about all the software functionalities.

- **Change Language**
  This option opens a window which allows to change the display language of ***EDC*** for the current session.

It is only necessary to click on one of the available languages and to accept the operation. The chosen language will be used by default during the entire session, unless changing it again from here or from a module.

- ***View error log**
  This option creates a report of all the errors made between a certain date range.

Note: In order to email this log on a regular basis, right-click on the EDC Client icon (on your desktop), select the menu item "Properties". In that window, click on the "Find target" button. In the "bin" directory: right-click on the "docu32.exe" icon, select the menu item "Properties". At the end of the application's name put emaillogemailaddress.com:numberofdays (ex: if you want to email the log for the past week, put: Remo32 EmailLog:support@docudatasoft.com:7 or to email the log for today, put: Remo32 EmailLog:support@docudatasoft.com:1). The email will go out with the SMTP server configured in the System Information 50 module.

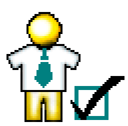
- **About**
  It displays the ***EDC*** version number, the user license count and the options activated with the current edition (SAI, OCR, etc.).

- **Who am I?**
  It displays the user name and when he started using the software.

- **Resources**
  It displays certain information on the computer system. As a general rule, the following minimal values are requested to insure the proper functioning of the system.

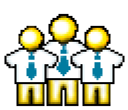
Available Memory	1,000,000 bytes
Disk Space	10 Megabytes
Database level	Must have the same level than the ***EDC***'s applications

3.9 Modules associated with EDC software management



Authorized User module

This module allows the management of authorized users and their access rights.



User Group module

This module allows the management of user groups and their access rights.

English and French Text module

This module allows modifying, consulting or printing the text from the system's terminology. The terms used by the software can be modified for each organization to reflect its internal terminology.

Access Log module

This module indicates the names of the people that have had access to the system and the ones that are using it at the moment.

System Information module

This module presents configuration system parameters (ex: the mask for the date field used everywhere in the system or the imaging parameters.)

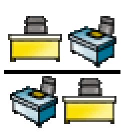
3.10 Modules associated with customer management

Customer Information module

This module allows to edit or view the information and the configuration parameters of the organization (ex: the default language used in the software.)

Source Location module

This module allows to manage the information about the different source locations of the organization. These information are mostly used to indicate the source of boxes before they were sent to the off-site record center.

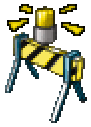


Department module

This module allows to manage the departments and sub-departments of the organization.

Retention Schedule module

This module allows to consult and create document types in the retention schedule for the organization. These types are used to classify documents. They are also used to calculate disposition dates and to specify disposal modes for files and boxes if the conservation policy is based on document types.



Restriction module

This module allows to manage restrictions; they are used to prevent errors during the creation of disposition lists and to make sure that documents with restricted types will not be put on these lists.

Delivery Address module

This module allows to manage the delivery addresses of the organization.

3.11 Modules associated with order processing

Circulation module

This module allows to manage the circulation of active documents. It allows to retrieve or send back documents internally. These in and out operations can be tracked, including the dates, the requesters and the recipients.

Order module

This module allows to create orders and consult information about previous requests, including their state, their recipient or their delivery date.

Non Track File module

Files that are not inventoried (non track) can be ordered separately. From this moment, these files are partially tracked. This module facilitates the consultation of information about them.

Delivery Imaging module

The off site record center scans every delivery slip signed by organization members when they receive documents. If the organization is linked electronically or by internet with the off-site record center, this module allows to consult, print, fax, send by email or save these scanned images.

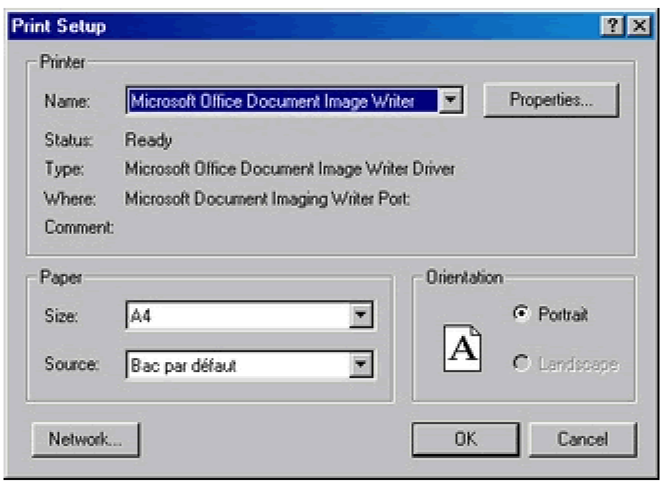
This module is used to facilitate the tracking of recipients and to allow e-mail information to be associated to a recipient. It also allows to scan for newly added recipients and print labels for these recipients in order for the PDT to scan their information.

3.12 Setting up the Printers

The configuration of printers should be handled by IT personnel or by qualified personnel with supervisor rights on the computer, server or network.

Setting up the laser printers

In every module window, a menu item called *Print Setup* is available under the *File* menu (**File->Print Setup** or by pressing the ***Shift*** and ***F7*** keys simultaneously).



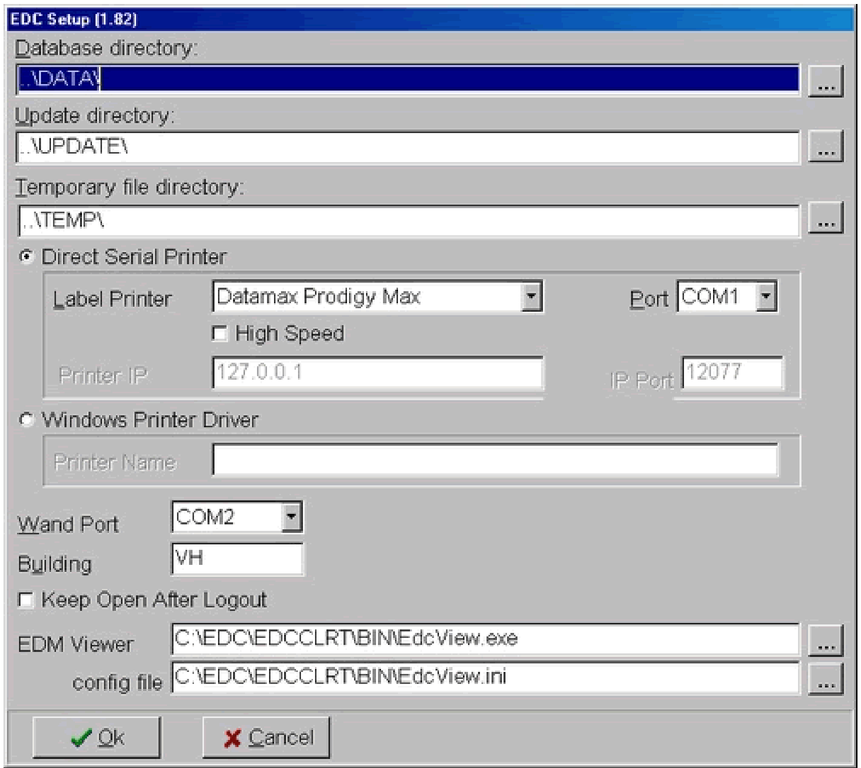
The default printer is automatically selected by the system. All the network printers appear in the drop-down list. The printer network can also be viewed by pressing the **Network** button.

Setting up the thermal printers

The thermal printers can be set up two ways in the configuration file (DC.CFG):

- Directly, by choosing a serial label printer in the drop-down list. The following models are available : Datamax Prodigy Max, Soabar SPX 360, Intermec 3400, Zebra Z4MPlus. When choosing one of these models, a COM port has to be selected in the drop-down list. If the Remote Printer has been chosen, an IP address and port have to be specified.

- By selecting a Windows Printer Driver and entering the Printer Name in the field.



Note: The DC.CFG can be accessed by going in the BIN directory of EDC.

3.13 Changes since last update

These are the changes that were done since the last update.

Version 4.50.00

3589 Integrate end user report builder with EDC RC and Client 135

Version 4.50.01

3598 Store explicit keywords separately for boxes and files 107

Version 4.50.02

3581 Accept IN TRANSIT boxes and files on itemized return items 204

Version 4.50.05

3726 Add "Added" activity in Activity Reports 151
3736 Add ability to import notes 1 and 2 in data import
3737 Allow modifying existing boxes with the data import
3762 Added global error log 31

Version 4.50.08

3828 Add command line option to email global log 31

Version 4.50.09

3900 Allow multiple passes with global fields update 170

Version 4.50.12

3926 List of inactive in-house files for a location range 155

Version 4.50.14

4078 Image import from third party scanning software 192

Version 4.50.15

4105 Allow batch full text indexing by RC number range 102

Version 4.50.17

4134 Allow batch full text indexing by RC number range 102

Version 4.50.18

4180 Allow batch addition of IN TRANSIT files in IN boxes 93

Version 4.50.25

4367 Simple user interface option to speed up on Terminal Server or Citrix 30
4336 Increase phone extension from 4 to 6 characters

Version 4.50.26

4386 Ability to let a user log out from EDC RC while keeping the program loaded -> this option is available in the configuration file (DC.CFG)
4428 Allow unlocking operations 53

Version 4.50.27

4466 Allow emailing images as PDF files 121
4482 Open the Box, File, or Document module from the Full Text Search 133

Version 4.50.30

4534 Add Search and Replace option in generic import

Version 4.50.33

4649 Customer option for Start Date/End Date validation 58

Version 4.50.34

4676 Allow sorting file selection form by box number

Version 4.50.35

4687 Fields update for files 170

Version 4.50.37

4735 Add an "Open module" button in the generic selection form.

Version 5.01.00

4860 Provide error feedback when replication fails 193

Version 5.00.01

4785 Allow using space as separator in import description files
4811 Support for Zebra printers 34
4842 Ability to initiate manual replication from EDC CL 51

Version 5.01.02

4885 Generate history items for replication when editing file extra fields
4888 Added a menu item in the Box and File Maintenance module to view the last replication date and time 193

Version 5.01.03

4915 Add deskew, despeckle, and border cleanup transforms to imaging module 124

Version 5.01.08

5058 Ability to add to disposal/transfer/deletion lists from list/text file
5091 Ability to import histories for boxes and files

Version 5.01.09

5001 Ability to email orders to record center when not replicating
5117 Include entries from document module 108 in full text search

Version 5.01.13

5132 Ability to customize which columns appear in search result of ActiveWeb for boxes and files. 59

Version 5.01.21

5271 Ability to customize which search types appear in ActiveWeb 71

Version 5.01.27

5458 Show extra fields when pressing the "View details" button for files

Version 5.01.28

5445 Ability to delete departments 77 that are not used
5490 Ability to use PDT 195 with EDC Client

Version 5.01.40

5660 Option to e-mail overdue memos 154

Version 5.01.47

5906 Ability to purge the global error log within a date range 52

Version 5.02.07

5619 Exclude the destroyed and deleted files from the file field of the box module

Version 5.02.13

6464 Support Avery format 05972

Version 5.02.14

6468 Support Avery Laser labels for A4 paper sizes
6471 Allow adding/editing files in the IN state with the file batch addition feature
6508 Add avery format L7169

Version 5.02.15

6513 Add ability to edit ReportBuilder style labels 52

Version 5.02.17

6650 Allow removal of recipient's 215 with out items

Version 5.02.24

6793 Add ability to add files in the Electronic state 92

Version 5.02.27

6892 Integrate EDCView 112 with file module

4 EDC software management

4.1 Outline (Management)

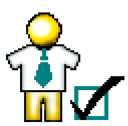
In order to use the software intelligently, you must go through a few easy steps to customize the software to your needs. The reason being that the more reflective of your company the software will be, the more efficient a tool it will become. These are the major steps to go through to make this possible :

1. Create user groups 44 that will define the different rights of the users.
2. Create authorized users 39
3. Set up the System information 50
4. Set up the Customer information 54
5. Create departments 76 and sub-departments
6. Create document types 79 that will define the retention of items
7. Create internal locations 147
8. Create source locations 74
9. Edit the terminology 47 of the software to fit your needs

4.2 Authorized User

4.2.1 Overview (Authorized User)

This module allows to edit, view or print information about authorized users (ex:access rights). New authorized users can also be created.



Available report

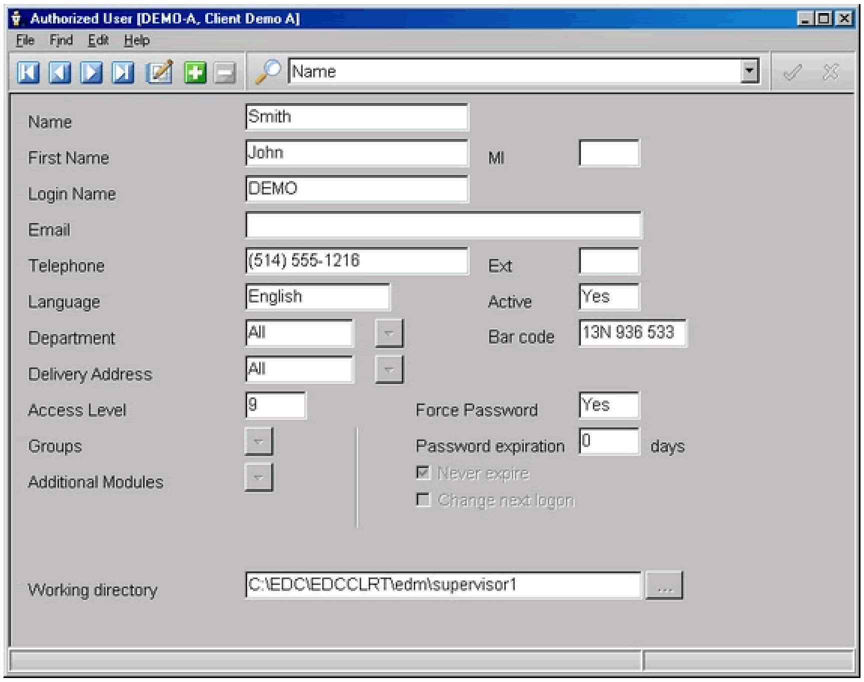
- list of authorized users

Fields 40 (see the next section)

Tasks

- Adding or editing users 41
- Defining the access rights of a user 41
- Editing the password of a user 43
- Viewing or printing a list of users 44
- Printing an authorized user label 44

Module's window



4.2.2 Fields (Authorized User)

Name, First Name, MI
Fields containing the authorized user's identification (MI: Initials for middle name).

Login Name
This field helps to access directly ***EDC*** when set properly.

Email
Field containing the email address of the user.

Telephone and Ext
Field containing the contact coordinates of the user (Ext : Extension).

Language
EDC software language for this user, which will apply by default as soon as the user logs into any ***EDC*** related application.

Department
Choice field containing "None", "Partial" or "All".
Allows access to the selected departments. When this field contains "Partial", it is possible to click on the consultation button to add or delete individual departments.

Delivery address
Choice field containing "None", "Partial" or "All".
Allows access to the selected delivery addresses. When this field contains "Partial", it is possible to click on the consultation button to add or delete individual delivery addresses.

Access level
This field can contain the values "0" through "9". The value "9" gives access to all documents.
The access level is used to limit the access of users to certain boxes or files. When documents are created, they are assigned an access level and these documents can only be edited and ordered by users possessing the appropriate access level.

Groups
Drop-down field (defined in the *User Group* 44 module).
In order to speed up work when adding new users, it is possible to define access profiles by assigning access rights to modules for groups. When creating or editing a user, simply select a group to give the user access to that group's privileges.

Additional modules
Drop-down field.
It is possible to add access rights to modules that are not included in the group(s) selected in the previous field.

Active
Choice field containing "Yes" or "No".
Indicates if this user has access to the system. When the value of this field is "No", the user will no longer appear on the list of users when launching ***EDC***.

Force Password, Password expiration
Indicates if a password is required for this user to access ***EDC*** and allows to set an expiration time for it.

Note: This field has no effect when the value of the *Force Password* field in the *Customer information* module is "Yes".

Shared customers
Coming soon in a future version of EDC Client.

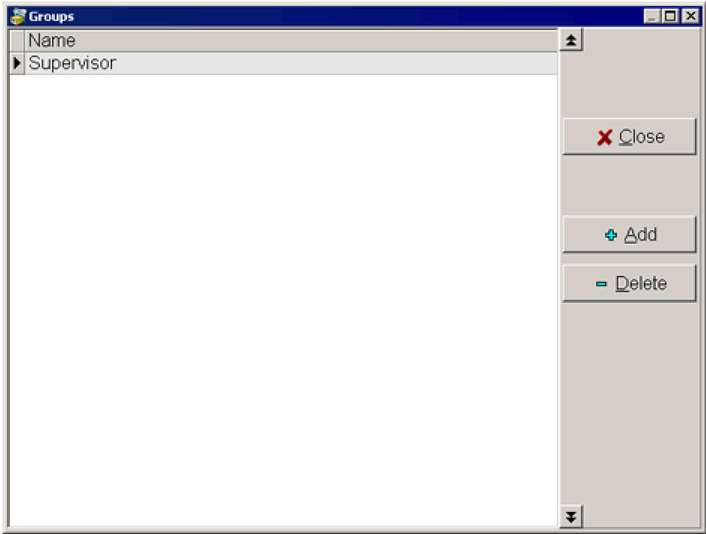
Working directory
Coming soon in a future version of EDC Client.

4.2.3 Adding or editing users

1. Click on **Customer**->**Authorized User** from the *Main window*.
2. Perform one of the following operations :
   - To add a user, click on the **Add** button.
   - To edit a user, select the user and click on the **Edit** button.
3. Enter information in appropriate fields (see the fields 40 section for more details).
4. Click on the **Accept** button when finished.

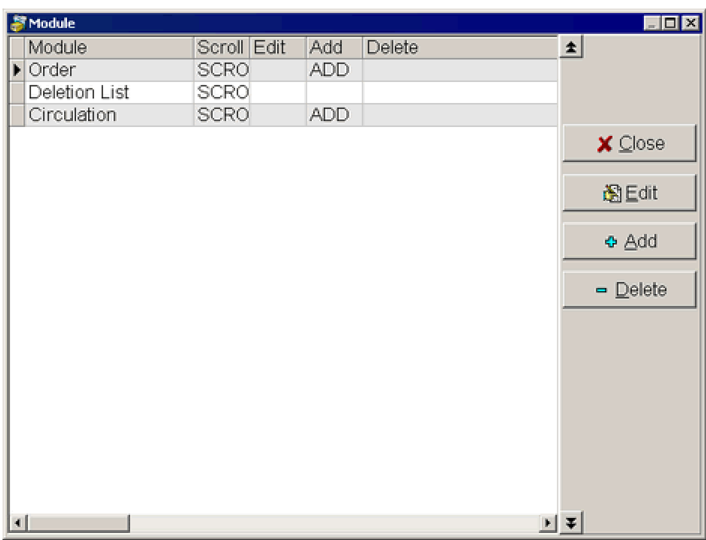
4.2.4 Defining the access rights of users

1. Click on **Management**->**Authorized User** from the *Main window*.
2. Select the desired user and click on the **Edit** button.
3. Move to the *Access Level* field and enter a number between "0" and "9" (9 giving access to all documents) or click on the switching button..
4. Move to the *Department* field and select "None", "All" or "Partial" with the switching button. If "Partial" is selected click on the drop-down button to choose the desired departments.
5. Move to the *Delivery Address* field and select "None", "All" or "Partial" with the switching button. If "Partial" is selected click on the drop-down button to choose the desired delivery addresses.
6. Click on the drop-down button to the right of the *Groups* 44 field. The following window appears, containing the groups already granted to the user.



- Click on the **Add** button to grant an other group to the user. Select a group in the list that is displayed and press **OK**. The group appears in the previous window.
- Select a group to remove (it will appear highlighted), click on the **Delete** button and then on the **Yes** button of the dialog box that appears.

7 Click on the drop-down button to the right of the *Additional modules* field. The following window appears, showing additional modules already granted to the user.



Note : The letters to the right of a module's name indicate its access rights.
S : Scroll; E : Edit; A : Add; D : Delete.

- Click on the **Add** button to grant an additional module to the user. Select a module in the list that is displayed and press **OK**. The additional module is added and appears in the previous window.
- Select a module to be modified and click on the **Edit** button. Perform the desired modifications.
- Select a module to be removed, click on the **Delete** button from the previous window and then click on the **Yes** button of the dialog box that appears.

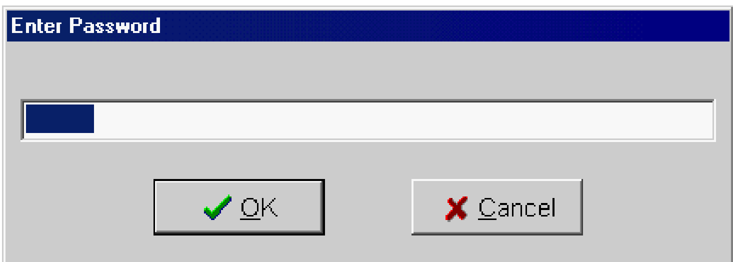
Note : When a module is added or edited a window appears and allows to specify access rights for this module.

8 Click on the **Accept** button of the module's window to save changes.

4.2.5 Editing password of users

Defining a password

1 Click on **Management**->**Authorized User** from the *Main window*.
2 Select the desired user.
3 Click on **Edit**->**Password**. A window appears.

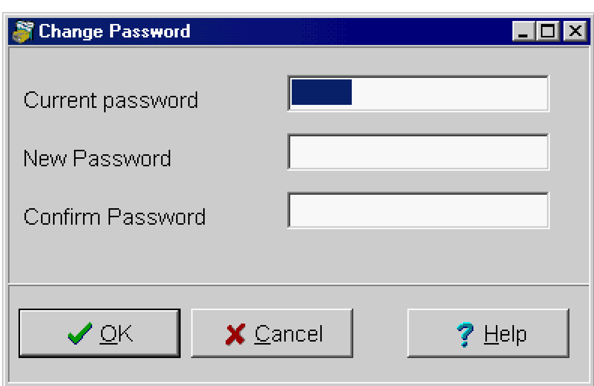


4 Enter the desired password and press **OK**.
5 Enter the password a second time and press **OK**.

Note : When a password is defined, the concerned user must use it in order to access the software, even if the value of the *Force Password* field from the *Customer Information* or the *Authorized User* modules is "No". To remove the use of passwords, it is necessary to erase the user's password and set the *Force Password* field of the *Customer Information* and the *Authorized User* modules to "No".

Normally, the password of an authorized user is edited in the *Authorized User* 43 module, but there is a shorter way to do this : modify the password when entering the system.

1 Double-click on the ***EDC*** icon to open a new session.
2 Select a user name and check off the **Change password** box.
3 Press **OK**. The following window appears instead of opening a new session.



4 Enter the requested information and press **OK**.
5 A new session opens and the password is automatically modified.

4.2.6 Deleting users

As mentioned before, a user only has to be defined as inactive to be removed from the system.

1 Click on **Management**->**Authorized User** from the *Main window*.
2 Click on **Find**->**Find** and enter the user's family name.
3 Press the **Accept** button and the system will display the user or any other one having a similar family name. In this case, use arrows from the button bar to view other users.
4 Click on **Edit**->**Edit**.
5 Move to the *Active* field, click on the drop-down button to the right of the field and set it to "No".
6 Click on the **Accept** button. The system automatically removes the user from the list. The user's name will not appear when opening a new session.

Note : It is not necessary to enter the user's information a second time in order to give him back access to the system. Only set the *Active* field to "Yes".

4.2.7 Viewing or printing a list of users

1 Click on **Management**->**Authorized User** from the *Main window*.
2 Click on **File**->**View report|Print report**.
3 The report will be automatically be printed or displayed on the screen.

Note : It is possible to produce a report containing inactive users and to sort it by department or alphabetical order.

4.2.8 Printing an authorized user label

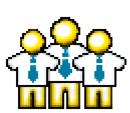
1 Click on **Management**->**Authorized User** from the *Main window*.
2 Click on **Find**->**Find** and enter the user's family name.
3 Press the **Accept** button and the system will display the user or any other one having a similar family name. In this case, use arrows from the button bar to view other users.
4 Click on **File->Print Thermal Label**.
5 The user's label will automatically be printed.

4.3 User Group

4.3.1 Overview (User Group)

This module allows to create or edit user groups, as well as view or print information about them (ex: access rights.)

This operation will speed up the creation of new authorized users with similar access privileges : simply include them in a group and they will have its access rights.



Available report

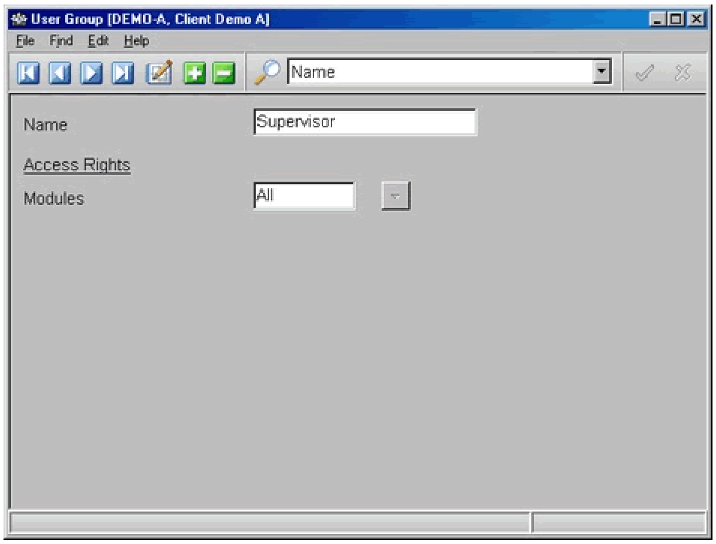
- list of user groups

Fields 45 (see the next section)

Tasks

- Adding or editing user groups 45
- Defining the access rights of user groups 46
- Copying and adding a user group
- Deleting user groups 46
- Viewing or printing a list of user groups 46

Module's window



4.3.2 Fields (User Group)

Name
Name of the group. This name will appear in the drop-down *Groups* field of the *Authorized User* 39 module.

Access Rights

The following field allows to define access rights for the group. Every user included in this group will have access to the modules granted here.

Module
Choice field containing "None", "Partial" or "All".
Allows access to the selected modules. When this field contains "Partial", it is possible to click on the drop-down button to add or delete individual modules.

4.3.3 Adding or editing user groups

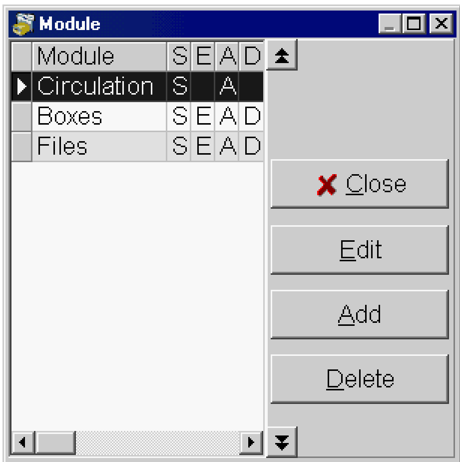
Adding or editing user groups

1 Click on **Management->User Group** from the *Main window*.
2
- To add a user group, click on the **Add** button.
- To edit a user group, select a group and click on the **Edit** button.

3 Enter the name of the group to add, and move to the Modules field.
4 Select "None", "All" or "Partial" with the switching button. If "Partial" has been selected, click on the drop-down button to the right of the field and add or remove desired modules in the related window.

*Defining the access rights of user groups

1 Click on **Management**->**User Group** from the *Main window*.
2 Select the desired user group and click on the **Edit** button.
3 Move to the *Modules* field and select "None", "All" or "Partial" with the switching button. If "Partial" has been selected, click on the drop-down button to the right of the field. The following window appears.



Note : The letters to the right of a module's name indicate its access rights.
S : Scroll; E : Edit; A : Add; D : Delete.

4 Perform the following steps :
- To remove access to a module, select it in the previous window and click on the **Delete** button. Then click on the **Yes** button of the dialog box that appears to confirm the operation.
- To add access to a module, click on the **Add** button from the previous window. The list of the module is displayed for addition. Select a module to be added and press **OK**. A window appears and allows to select the access rights of the module.
- To edit the access rights of a module, select one in the window opened in **3**, click on the **Edit** button and proceed as before to define its access rights.

5 Click on the **Close** button from the window opened in **3** to finish and click on the **Accept** button from the window's module.

4.3.4 Deleting user groups

1 Click on **Management**->**User Group** from the *Main window*.
2 Select the desired group.
3 Click on the **Delete** button.

Note : To delete a group, it must not be granted to any authorized user (see "Defining or editing a user's access rights 41").

4.3.5 Viewing or printing a list of user groups

1 Click on **Management**->**User Group** from the *Main window*.
2 Click on **File**->**View report**|**Print report**.
3 The report will be automatically be printed or displayed on the screen.

4.4 Dictionary

4.4.1 Overview (Dictionary)

This module allows to edit, view or print the terminology used in the system. The terms used in ***EDC*** can be adapted to the needs of the organization.

Available report

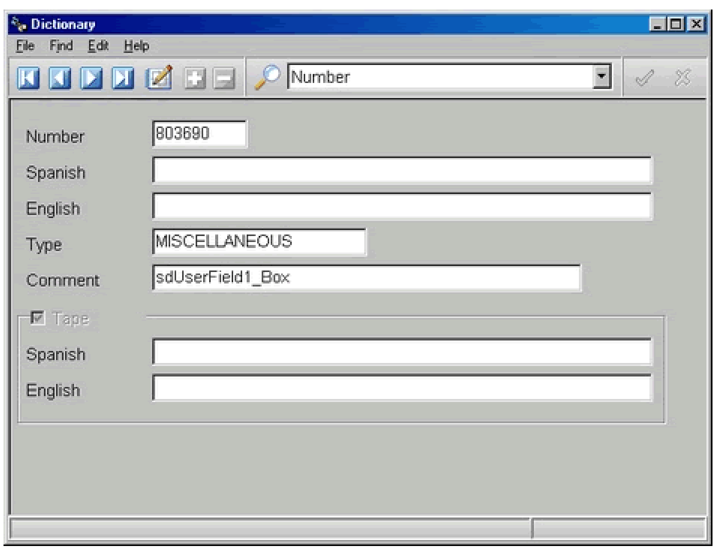
- list of terms used in the software

Fields 47 (see the next section)

Tasks

- Editing the software's terminology 47
- Viewing or printing the software's terminology 48

Module's window



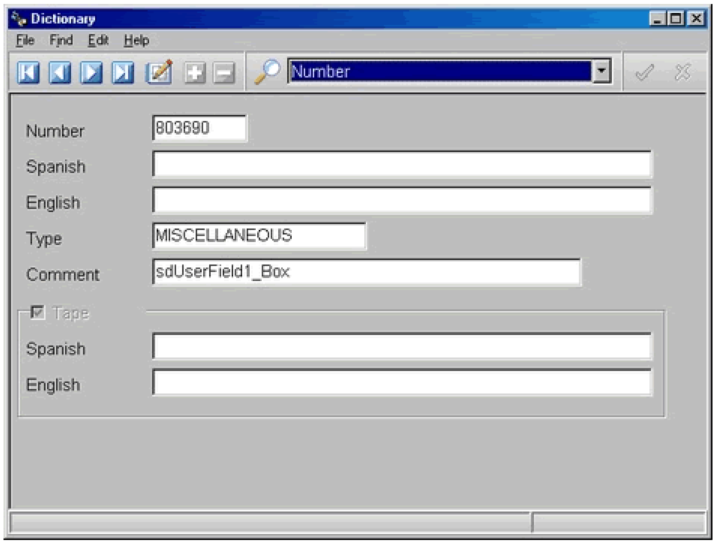
4.4.2 Fields (Dictionary)

Number, Type and Comment
These fields are read-only. They are part of the software's internal settings.

Languages (French, English, Spanish, Dutch, etc.)
Terminology used in ***EDC***.

4.4.3 Editing the terminology of the software

1. Click on **Management**->**Dictionary** from the *Main window*.
2. Click on **Edit**->**Search and replace**. A window appears.



3 Enter the items to be searched or replaced in both languages or just in one language, press **OK**. A window appears for every term of the software where the searched items are present. This is a procedure to provide changes everywhere in the software where the item is used.
4 For each window that appears, click on **Yes** to approve the modification, click on **No** to keep the original term and go to the next term or on the **Cancel** button to abort the following operations.

4.4.4 Viewing or printing the software's terminology

1 Click on **Management**->**Dictionary** from the *Main window*.
2 Click on **File**->**View report | Print report**.

Note : The list of terms used in the software can be indexed by number.

4.5 Access Log

4.5.1 Overview (Access Log)

This module allows to view or print access log. This access log indicates who has access to ***EDC*** and who is using it at the moment. In this module, an authorized user can terminate the access for one or more users if a session is inactive after computer failure. All licenses can be used after a computer failure and prevent access to the system. In that case, open the ***Access Management*** program to terminate inactive sessions (the icon is located in the same group as ***EDC*** software). Suspended sessions will free themselves after 12 hours.

Available report

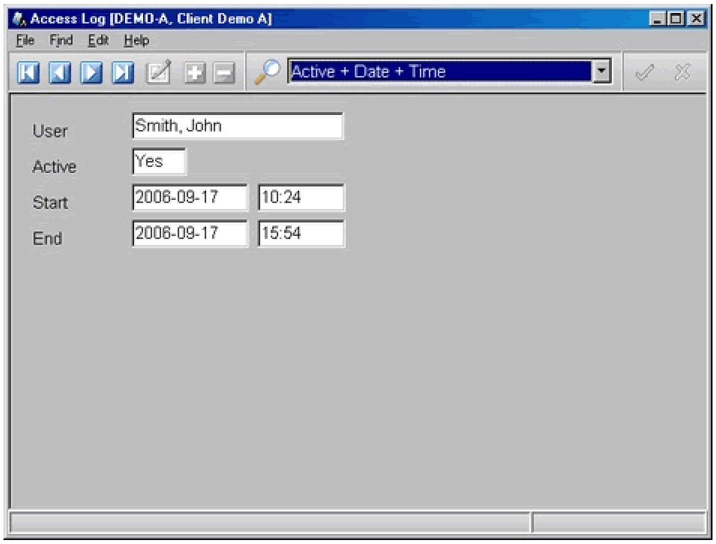
- access log for a specific period

Fields 49 (see the next section)

Tasks

- Terminating an active session 49
- Viewing or printing a list of access rights 49

Module's window



4.5.2 Fields (Access Log)

User
Indicates the user's name.

Active
Indicates if the user is currently using ***EDC***.

Start
Start date and time of the selected session.

End
End date and time of the selected session.

4.5.3 Terminating an active session

As mentioned earlier, if a session is inactive after a computer failure it is possible to terminate it.

1. Click on **Management**->**Access Log** from the *Main window*.
2. Select the inactive session by using the button bar.
3. Click on **Edit**->**Terminate session**.

Note : When all licenses are in use after a computer failure and prevent access to the system there is no other solution than to start the ***Access Management*** program to terminate all the inactive sessions.

4.5.4 Viewing or printing a list of active sessions

1. Click on **Management**->**Access Log** from the *Main window*.
2. Click on **File**->**View report|Print report**. A window appears.
3. Enter an interval of dates for which the report has to be produced and press **OK**. The report is

automatically displayed or printed.

4.6 System Information

4.6.1 Overview (System Information)

This module allows to edit the configuration parameters that will be used everywhere in the system (ex: the default volume of boxes.

Available report

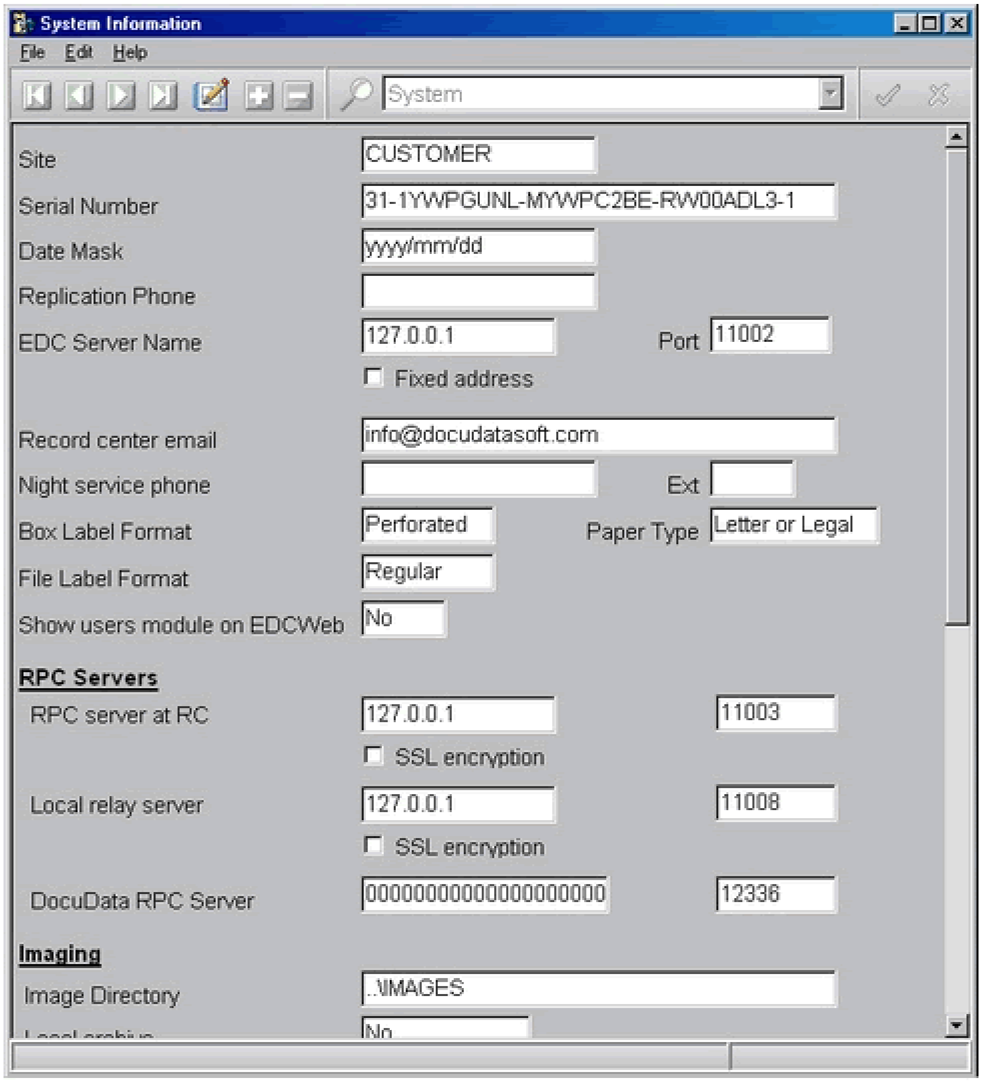
- list of system information

Fields (see the next section)

Tasks

- Viewing or printing system information 51
- Replicating with the Record Center 51
- Configuring the PDT 52
- Purging the Error Log 52
- Editing system information 52
- Editing the noise words
- Editing label templates 52
- View and Unlock locked operations 53
- Changing the image directory

Module's window



4.6.2 Viewing or printing system informations

1 Click on **Management->System Information** from the *Main Window.*
2 Click on **File->View Report|Print Report.**
3 The report will automatically be displayed or printed.

4.6.3 Replicating with the Record Center

1 Click on **Management->System Information** from the *Main Window.*
2 Click on **File->On Demand Replication.** A window appears.
3 Enter a range of dates for which you want the replication to be performed and press **OK**. All the data will be copied from the client database to the record center's database, thus updating the status of boxes and files at the record center.

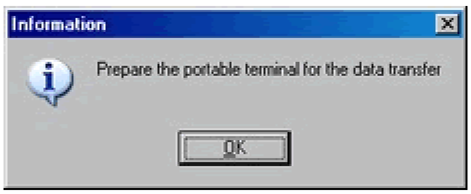
Note: If a socket error is encountered, check the ***EDC Server Name*** and ***Port*** fields in the *System Information* and verify their content's validity. Make sure that your firewall is well configured to enable communication via this port. If the problem persists, contact your record center.

4.6.4 Configuring the PDT

This option allows to update the PDT configuration before performing any operation with the device. For more information on how to use the PDT, consult the Using the PDT 195 chapter.

Normally, only the supervisor has access to the *System Information* module and is able to modify the system information (module's fields). In fact, some of these modifications can have an impact on the interpretation of data scanned with the PDT. This is the case for the *Alternate bar code lengths* field. That is why the supervisor should think to reconfigure the PDTs anytime a system information is modified.

1 Click on **Management**->**System Information** from the *Main window*.
2 Click on **File**->**Configure PDT**. A dialog box appears.



3 As recommended, prepare the PDT to receive the data by pressing **1-Receive** on the terminal. Press **OK** in the dialog box. As soon as the transfer is complete, the PDT is ready to process any operation (picking, returns, refiling, etc).

4.6.5 Purging the Error Log

Purging the error log is a maintenance operation that can be performed every two or three months (or more), to reduce the amount of information to sort through when an error must be consulted for problem solving. Usually the error log is used by IT personnel to make sure everything is working properly, thus the purge enables them to easily track recurring problems and to report them to their record center.

1 Click on **Management->System Information** from the *Main Window.*
2 Click on **File->Purge Error Log .** A window appears.
3 Enter a date range for which you want the purge to be performed and press **OK**. All the data contained in the error log within this date range will be deleted from the file. The changes will be noticeable if the error log is consulted (**Main window ->Help ->View Error Log**).

4.6.6 Editing the system information

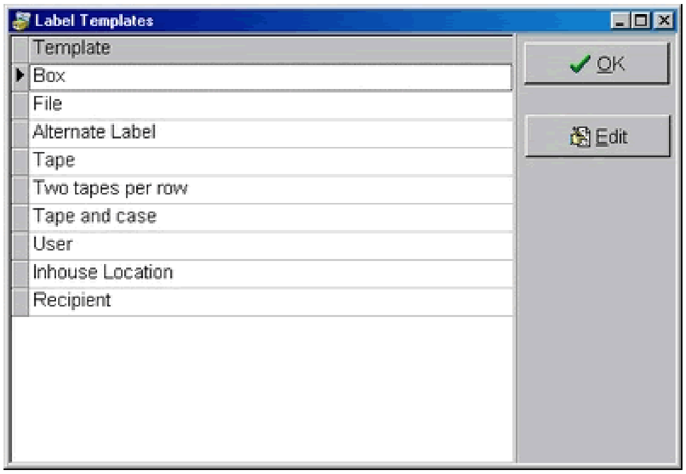
In order to know what parameters can be configured, consult the field descriptions of the *System Information* module.

1 Click on **Management**->**System Information** from the *Main Window*.
2 Click on the **Edit** button.
3 Enter the information in the appropriate fields.
4 Click on the **Accept** button.

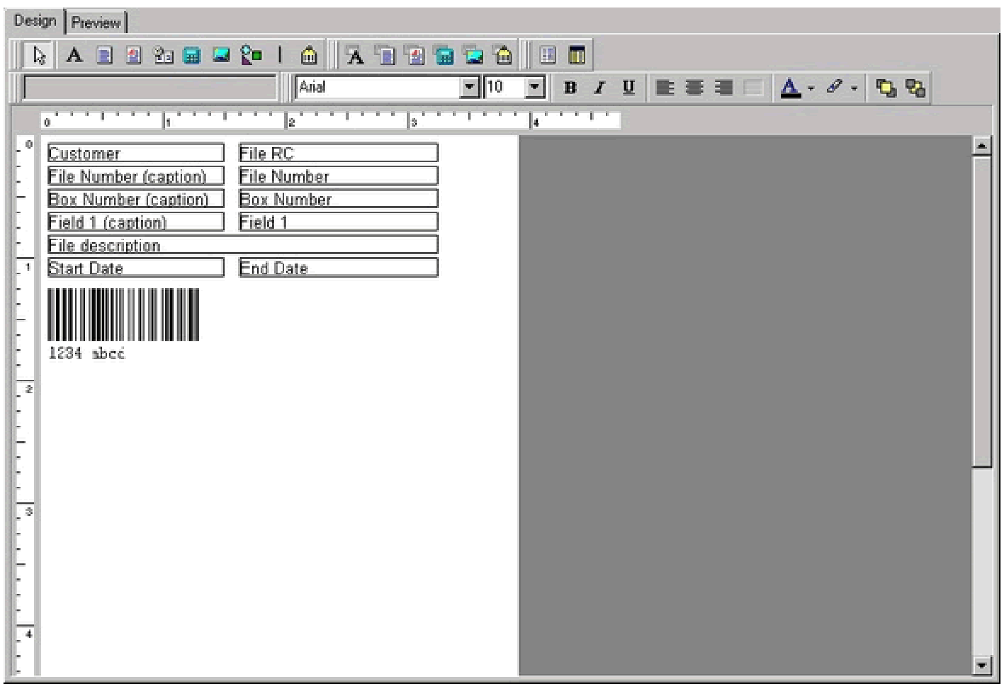
4.6.7 Editing Label Templates

These label templates are the ones used by EDC when printing thermal labels on thermal printers that use Windows printer drivers. This allows you to customize every thermal label template used by the system.

1 Click on **Management**->**System Information** from the *Main window*.
2 Click on **Edit**->**Label Templates**. A window appears.



3 Select the template and double click on it or press **Edit**. The template will appear in a window similar to the *SQL Report* module. Here is an example :



The information can be deleted, modified (size or text format) or moved. For more detailed information concerning the modification of label templates, see the Working with the design tab 140 topic.

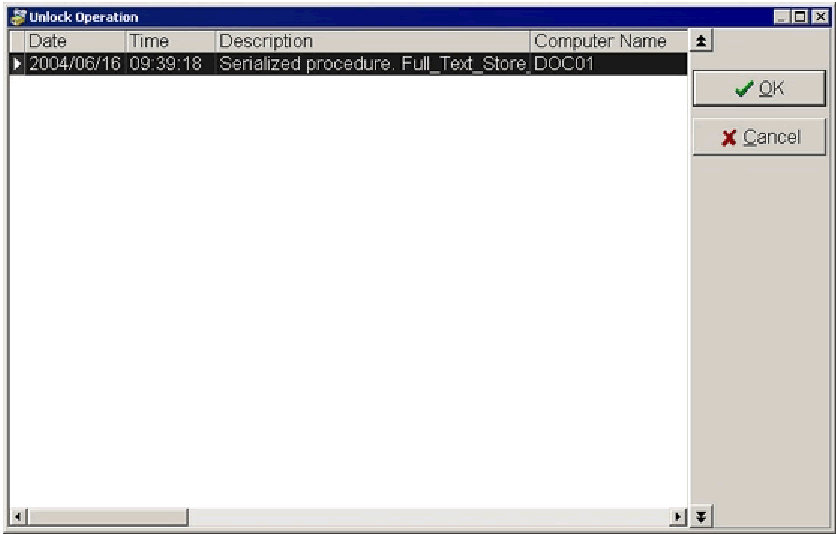
4 When all the changes have been performed, close the window. The system will prompt you to save the changes. To save the changes press *Yes*, to cancel your modifications press *No* and to make more modifications press *Cancel*.

5 If you have no more templates to edit press **OK**. If you want to modify other templates, repeat steps **1** to **4**.

4.6.8 View and unlock locked operations

This operation allows to view and to unlock locked tasks. When a task is locked, the module cannot be used by the employees.

1 Click on **Management**->**System Information** from the *Main window*.
2 Click on **Edit**->**Unlock operations**. A window opens on the screen.



3 To unlock an operation: select the wanted operation (it will appear highlighted) and press **OK**.

5 Corporate information management

5.1 Outline (Customer)

The management of corporate information includes all the information identifying the organization and making it a distinctive institution.
This information is separated between several modules; each of them describes a specific aspect of the organization and reflects its internal administration : *Customer Information* 54, *Source Location* 74, *Department* 76, *Retention Schedule* 79, *Restriction* 83 and *Delivery Address* 84.

All the information contained in these modules is essential, since it defines the different operations, the conservation policies and helps manage the organization's archives.

5.2 Customer Information

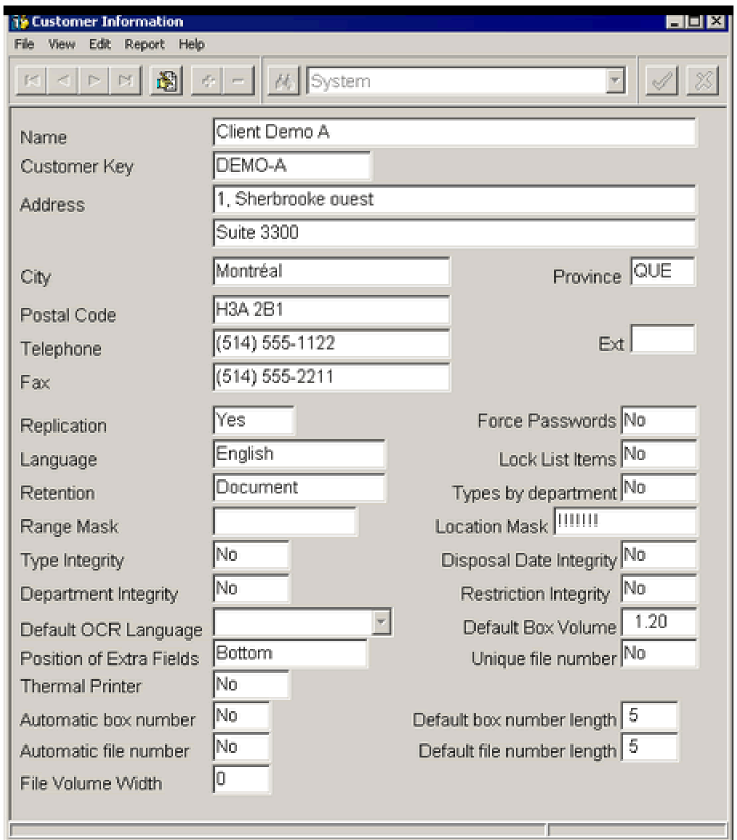
5.2.1 Overview (Customer Information)

This module allows to set up the general elements of **EDC** that will be used frequently by the different users. In this module, it will be possible to configure and customize the different reports, edit different templates, define the default language. Most importantly, it will specify the type of conservation policy, the different masks used in the software and the different integrity settings.

Fields 55 (see the next section)

Tasks

Module's window



5.2.2 Fields (Customer Information)

Name
Name of the organization.

Customer Key
Identification code at the off-site record center.

Address/City/Province/Postal Code/Telephone/Ext/Fax
Contact information of the organization.

Replication
Indicates if records are linked and updated on a daily basis with an off-site record center.

Force Passwords
Indicates if users must have a password in order to access the ***EDC*** software.

Note : The field *Force Password* in the *Authorized User* module has no effect when this field's value is "Yes".

Language
Choice field containing organization's preferred language.
Indicates the language used to communicate with the off-site record center. This language will also be used to produce reports.

Lock List Items
Choice field containing "Yes" or "No".
When its value is "Yes", the state of the items on a disposal, transfer or deletion list is changed to "ON DISPOSAL", "ON TRANSFER" or "ON DELETION" (depending on the list) at the time the items are placed on a list; this means that those items will not be able to be ordered. When the value of this field is "No", the state of the items will only be changed when the list is sent to the off-site record center; this means that the items on the list could be ordered up to that moment.

Retention
Choice field containing "Document" or "Sub-department".
Indicates the conservation policy 229. The conservation policy is usually set by document type (see the *Retention Schedule* 79 module).

Types by department
Choice field containing "Yes" or "No".
Departments are associated with document types when the value of this field is set to "Yes". This means that departments will automatically be entered when a document type is selected for a box or file. These associations are defined in the *Retention Schedule* module 79.

Range Mask
Mask 229 definition of the *Range* field which is located in the *Box* and *File* modules.

Location Mask
Alphanumeric field containing a maximum of 20 characters.
Definition of the mask 229 for the *Location* field that is present in the *File* 88, *Box* 88 and *Internal Location* 148 modules. This field allows to define the codification of internal storage locations.

Note : The location mask should be carefully thought out so that it accurately reflects the physical storage organization.

Type Integrity
Choice field containing "Yes" or "No".
When its value is set to "Yes", indicates that all files contained in a box must be of the same document type as the box.

Disposal Date Integrity
Choice field containing "Yes" or "No".
When its value is set to "Yes", indicates that all files contained in a box must have a disposal date that is earlier or equal to the disposal date of the box.

Department Integrity
Choice field containing "Yes" or "No".
When its value is set to "Yes", indicates that all files included in a box must be of the same

department as the box.

Restriction Integrity
Choice field containing "Yes" or "No".
When its value is set to "Yes", indicates that the files within a box cannot be assigned a restriction that is not already assigned to the box. For example, a box with the "X", "Y" and "Z" restrictions can include files that do not have restrictions and files with the "X" restriction. However, files with the "O" restriction could not be included in that box.

Note : If the type integrity is set to "Yes", the value of the *Restriction Integrity* field will have no effect since restrictions are associated to document types.

Default OCR Language
Default language used for Optical Character Recognition (OCR) of scanned images.

Default Box Volume
Box volume that will appear in the *Box* module when creating a new entry.

Position of Extra Fields
Indicates the position (up or down) where extra fields for files will be displayed.

Unique file number
Choice field containing "Yes" or "No".
When this field is set to "Yes", every file added to the inventory must have a single number, otherwise the system will reject the addition and will mention that its is a duplicate file.

Thermal printer
Choice field containing "Yes" or "No".
When this field is set to "Yes", it will be possible to print thermal labels if the printer is set up properly.

Automatic box number
Choice field that can contain "Yes" or "No".
When this field is set to"Yes", the system auto-generates a number for boxes added to the inventory; it attributes them a default number similar to the RC number.

Default box number length
Numeric field that can contain a maximum of 2 characters.
This field is efficient only when the next field is set to "Yes". It allows to specify the length for automatic box numbers. When the RC number of the box is shorter than this value, the system adds zeros beside the automatic number; when the RC number is longer, the current value has no effect.

Automatic file number
Choice field that can contain "Yes" or "No".
When this field is set to"Yes", the system auto-generates a number for files added to the inventory; it attributes them a default number similar to the RC number.

Default file number length
Numeric field that can contain a maximum of 2 characters.
This field is efficient only when the next field is set to "Yes". It allows to specify the length for automatic file numbers. When the RC number of the file is shorter than this value, the system adds zeros beside the automatic number; when the RC number is longer, the current value has no effect.

File volume width
Numeric field that can contain a maximum of 1 character.

This field relates to the number of digits to be used when numbering files using the classification plan.

Validate Date Range
Choice field containing "Yes" or "No".
When this field is set to "No" the system will not validate if the *Start Date* is before or after the *End Date*. This will apply for boxes and files.

5.2.3 Defining the main parameters for record management

In order to know what parameters can be configured, consult the description of fields 55 from the *Customer Information* module.

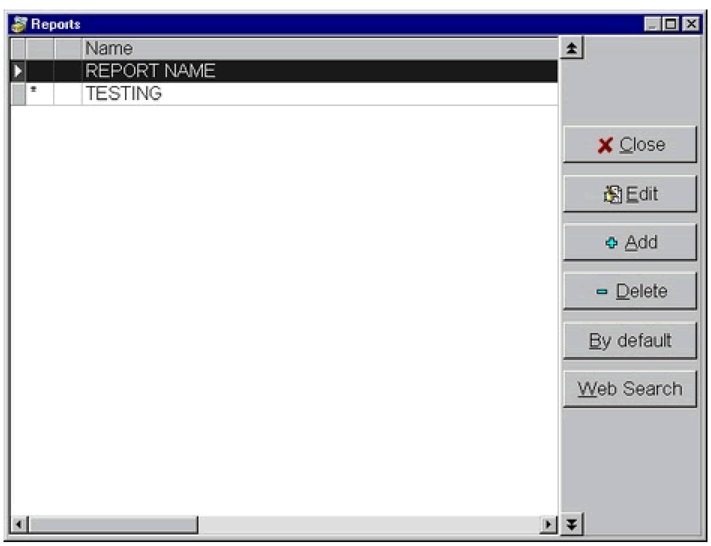
1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on the **Edit** button.
3 Select the desired field and perform the modifications needed. Repeat the operation for other fields.
4 When done, click on the **Accept** button.

5.2.4 Creating, deleting and configuring custom reports

The reports pre-defined here allow to specify which information will be displayed in the reports of boxes and files, and also in the scanning and selection lists produced in ***EDC***. Pre-defined reports are granted to a customer automatically.

The current operation allows to edit these reports or to add new reports to the list of available reports. This section also allows to set a report by default for EDC use as well as Web use (ActiveWeb).

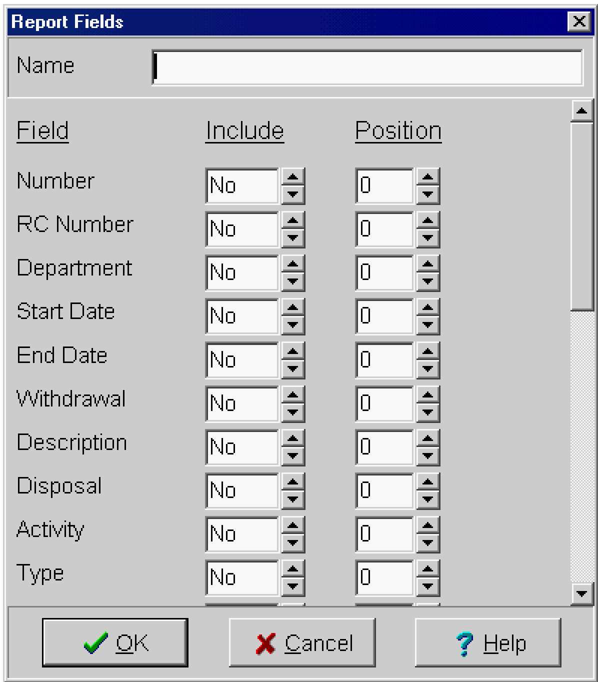
1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on **Report**->**Box Report Fields|File Report Fields**. A window appears and contains the reports already defined, if such is the case.



3 Perform one of the following operations :

- To delete a predefined report, select it and click on the **Delete** button.

- To create or modify a predefined report, select it and click respectively on the **Add** or the **Edit** button. A window appears. When adding a new report it is empty but contains the settings already entered for a predefined report that has to be modified.



Enter or modify the name of the report then click on the choice buttons in the *Include* column and set to "Yes" the fields that must appear on the report. After, click on the choice button in the *Position* column to set the tabulation order of the fields on the report. Press **OK** when all the modifications have been made. The window opened in **2** reappears.

4 Select a report and click on the **By default** button to set this report as the default one for EDC. A small mark appears on the left of this report.

Note : The default report is the one that will be displayed or printed when producing reports, unless choosing another report or setting different fields with the *Report Options* menu of the module concerned. Take note that when modifying a report via the *Report Options*, the system does not change the settings of this report permanently.

***5** To select a default report for the web search, select a report (it will appear highlighted) and press on the **Web Search** button.

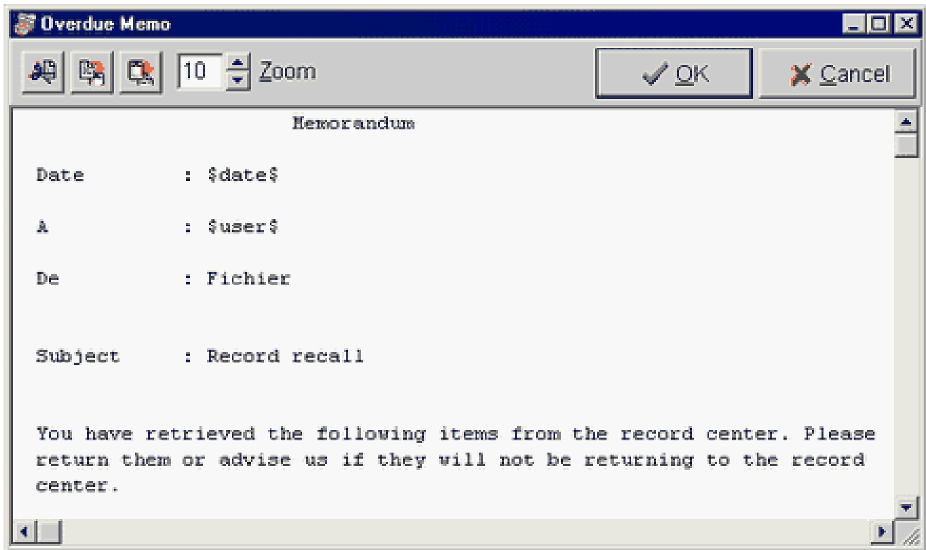
This default report will organize the different columns of the customer's search results on the web if they have an Internet access to EDC (ActiveWeb).

To customize the list of search types that will be accessible on the Web, go to the Editing the web search parameters 71 topic.

6 Click on the **Close** button to save changes.

5.2.5 Editing overdue memo templates

1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on **Edit**->**Overdue Memo**. The following window appears.

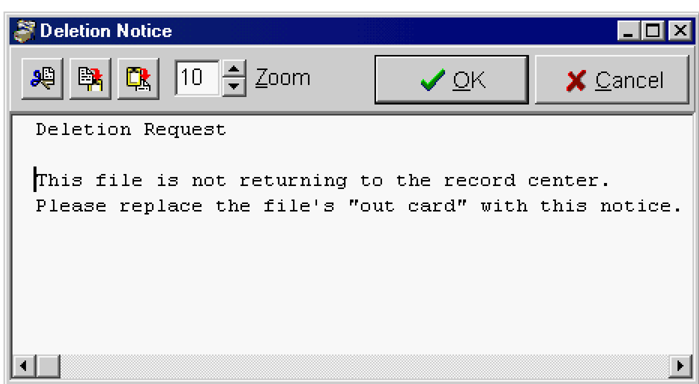


3 Perform the desired modifications.
4 Press **OK**

Note : **$date$** and **$user$** are used to insert the date of the report and the user who has overdue documents.

5.2.6 Editing deletion notice templates

1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on **Edit**->**Deletion Notice**. The following window appears.

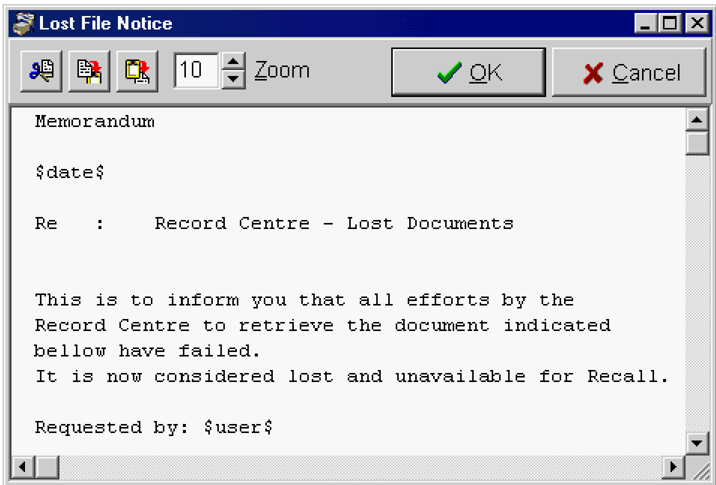


3 Perform the desired modifications.
4 Press **OK**

Note: Deletion notices can be printed in the *Non Track File* module, consult the Printing a Deletion Notice 213 topic for more information.

5.2.7 Editing lost file notice templates

1. Click on **Customer**->**Customer Information** from the *Main window*.
2. Click on **Edit**->**Lost File Notice**. The following window appears.



3. Perform the desired modifications.
4. Press **OK**

5.2.8 Defining the mask for internal locations

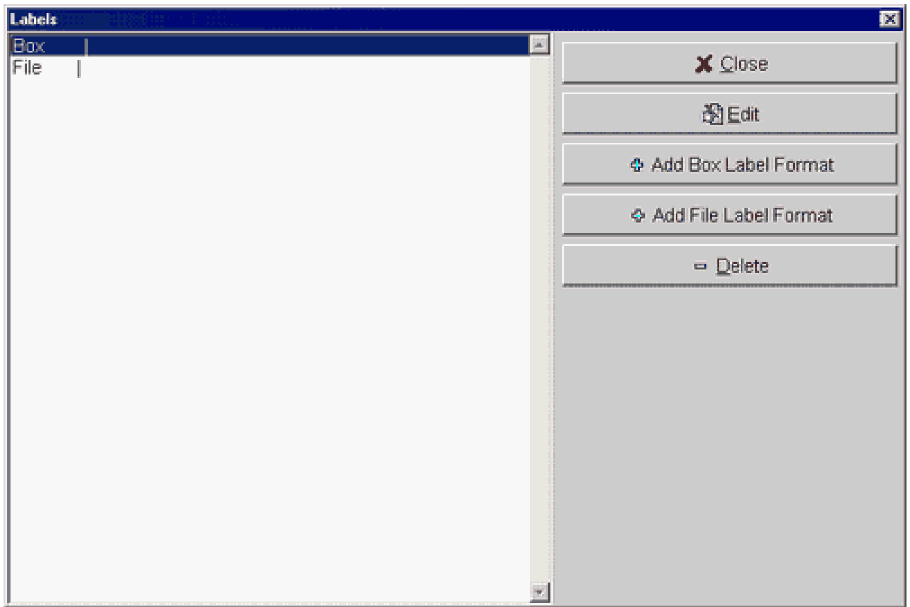
This operation allows to define the codification of internal storage locations.

1. Click on **Customer**->**Customer Information** from the *Main window*.
2. Click on the **Edit** button.
3. Select the *Location Mask* field and define the mask criteria 229.
4. Click on the **Accept** button.

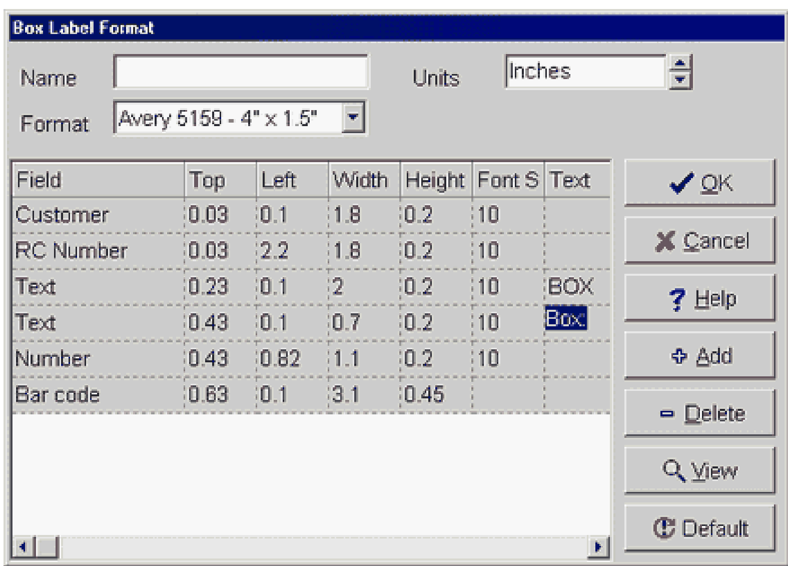
Note : The location mask should be carefully thought out so that it accurately reflects the physical storage organization. This mask should only be modified when no documents have been entered in the system; once a document is entered, this mask should not be changed.

5.2.9 Defining custom labels for boxes and files

1. Click on **Customer**->**Customer Information** from the *Main Window*.
2. Click on **Edit**->**Labels**. The following window appears and contains default formats.

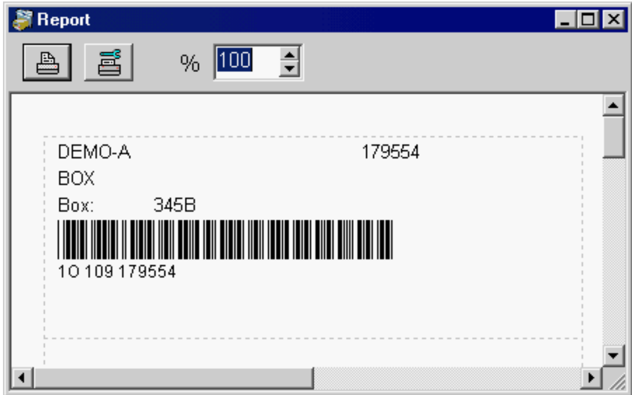


3 Click on the **Add Box Label Format** button to edit box labels or on the **Add File Label Format** button for files. The following window opens, containing also many lines where each describes a value defined in the system.



4 Lines can be added or removed if desired, and their parameters can be modified. Each line represents an element on the label.

- To add an element on the label, click on the **Add** button.
- To remove an element on the label, click anywhere on the desired line and click on the **Delete** button.
- To modify element's parameters (a line's column), click on the desired parameter (column line) and change it (see step **5** below).
- To view the label's appearance, click on the **View** button. The report's window opens.



- To restore the system's default values, click on the **Default** button.

5 Here is a description of the parameters that can be set for every element of the label (columns in the window shown in step **3**).

- Field : click on the drop-down button and select the field to include on the label.
- Top : indicate the distance between the element and the top side of the label.
- Left : indicate the distance between the element and the left side of the label
- Width : indicate the width that the element will take up on the label. Characters that do not fit within the width will not appear.
- Height : indicate the height that the element will take up on the label. If the font size is too large, the text will not appear.
- Font size : indicate the point size of the text shown on the element.
- Text : effective only if "Text" has been selected as a field type. Allows to specify the text that will appear on all labels.

6 Click on the **Accept** button from the window shown in step **3**.
7 Click on the **Close** button from the window shown in step **2**.

Note : The *Units* field from the window shown in step **3** allows to select inches or centimeters as the unit for elements on the label. Then it is important to double-check the unit before entering numeric values.

List of the supported Avery labels.

Number	**Width (" / cm)**	**Height (" / cm)**	**Columns x Rows**
Avery 5095	3,38 / 8,59	2,33 / 5,92	2 x 4
Avery 5159	4,02 / 10,2	1,52 / 3,85	2 x 7
Avery 5161	4 / 10,16	1 / 2,54	2 x 10
Avery 5162	4/ 10,16	1,33 / 3,38	2 x 7
Avery 5163	4 / 10,16	2 / 5,08	2 x 5
Avery 5164	4 / 10,16	3,33 / 8,46	2 x 3
Avery 5165	8,5 / 21,59	11 / 27,94	1 x 1
Avery 5197	4 / 10,16	1,5 / 3,81	2 x 6
Avery 5198	3,5 / 8,89	1,67 / 4,24	2 x 6
Avery 5199	3,06 / 7,77	1,83 / 4,65	2 x 5
Avery 5266	3,44 / 8,74	0,67 / 1,69	2 x 15

5.2.10 Defining or viewing the signing officer

The signing officer is the person with the authority to approve disposal lists. When no signing officer is defined, the creator of the list assumes this function.

Defining the signing officer

1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on **Edit**->**Signing Officer**.
3 Select the desired person.
4 Click on the **Accept** button.

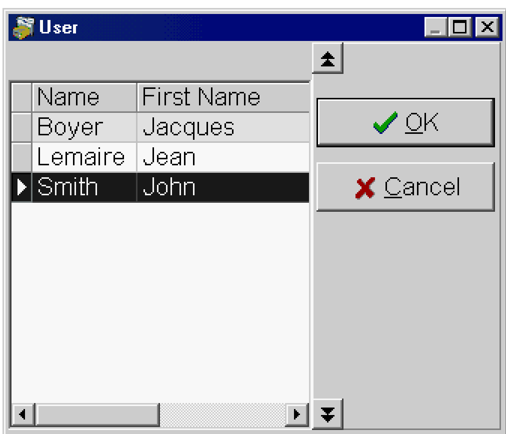
Viewing the signing officer

1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on **View**->**Signing Officer**.
3 An information message appears showing the Signing officer.

5.2.11 Viewing or editing the default order user

The default order user defined here is the one that will automatically be used for fast orders at the remote record center.

1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on **Edit**->**Default order user**. A window appears, containing the list of authorized users for the customer.

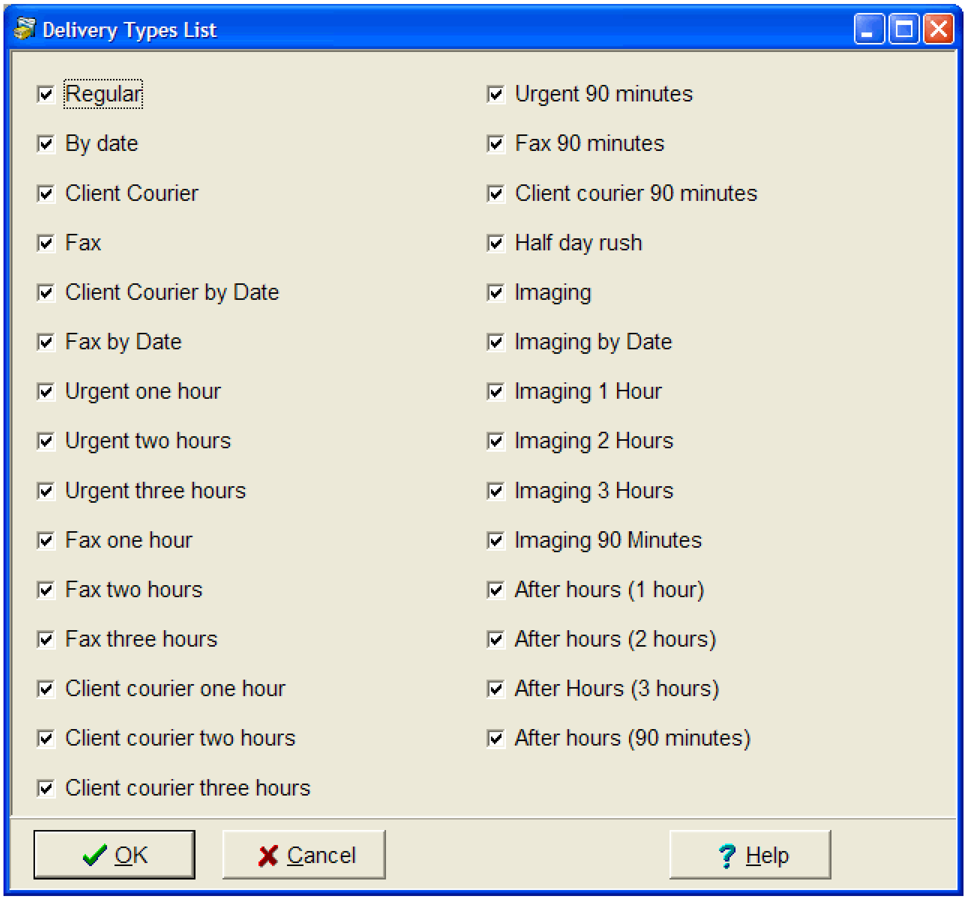


3 Select a user and press **OK** to register the selection.
4 To view the default order user later, open this module again and click on **View**->**Default order user**. A message appears, containing the user previously selected.
5 Press **OK** to go back to the module.

5.2.12 Editing the delivery type access

This option is used to define the type of deliveries that will be accessible to all the authorized users of the organization.

1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on **Edit**-> **Delivery type access**
3 A window appears.

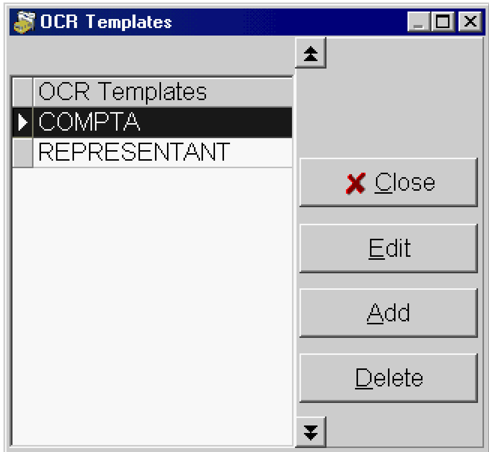


4 Select the delivery types that you want to have access to by checking the box beside it.
5 When the selection is complete, press **OK**. To cancel the changes you have made click on the **Cancel** button.

5.2.13 Defining an OCR template

The OCR templates (Optical Character Recognition) must be defined in order to perform OCR and indexation.

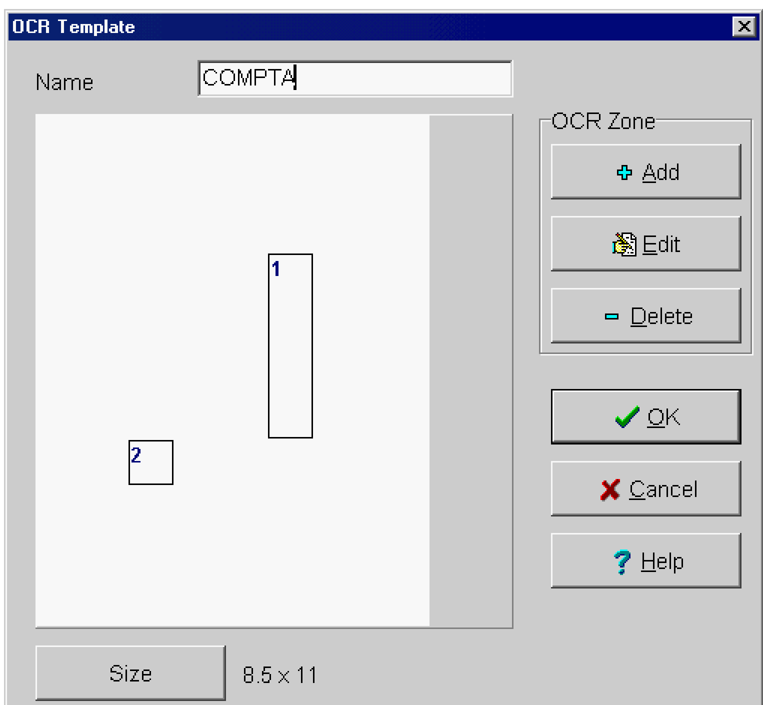
1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on **Edit**->**OCR Templates**. The following window appears, containing OCR templates already defined.



3 Perform one of the following operations :

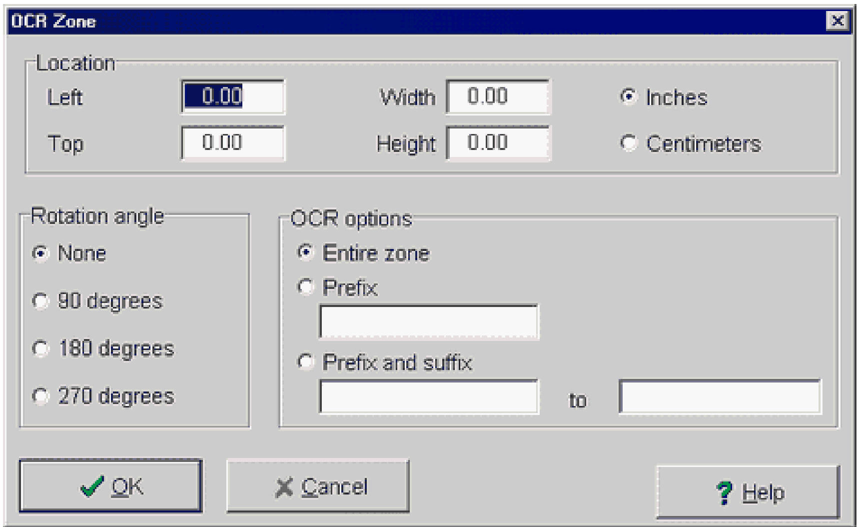
- To delete an OCR template, select it and click on the **Delete** button.
- To modify an OCR template, select it and click on the **Edit** button.
- To create an OCR template, click on the **Add** button.

When creating or editing OCR template, the following window appears, containing already defined ORC zones (edited templates).



Note : An OCR template can contain many recognition zones, that will be identified by a number following the creation order, as in the previous window.

Enter the identification name for the new template and click on the **Add** button to create its first recognition zone. A window appears.



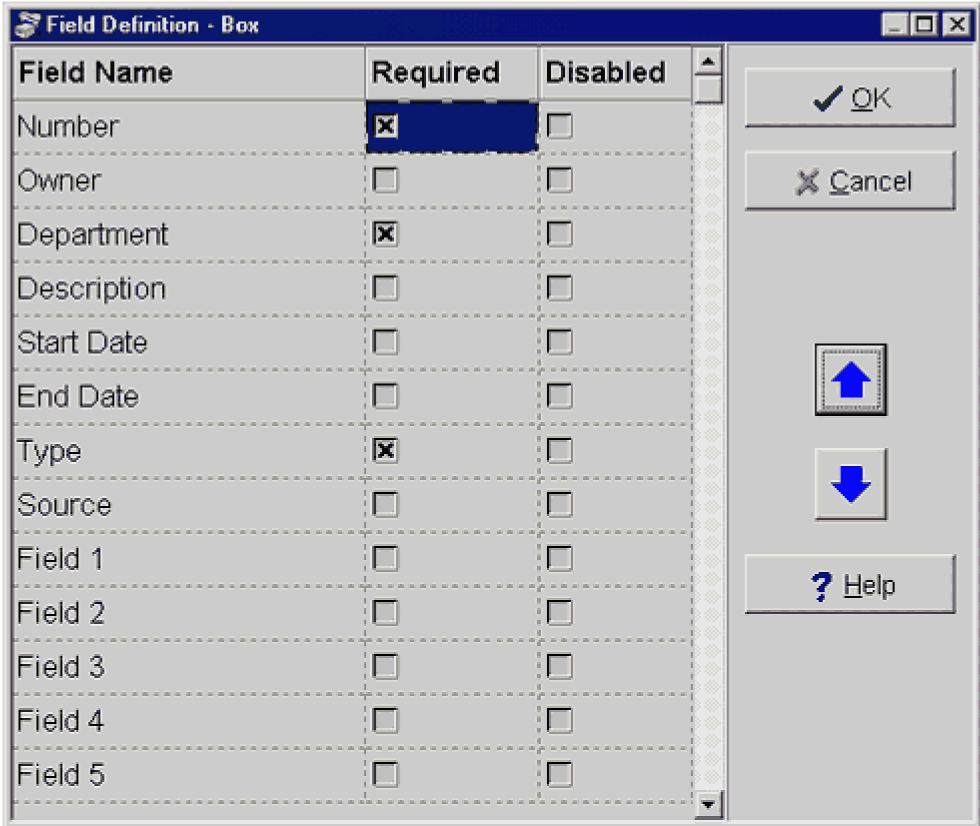
Location : distance to the *Left* and the *Top* of the template, *Width* and *Height* for the zone on scanned documents;
Rotation angle : determine characters orientation reading (0°, 90°, 180°, 270°);
OCR options : content of the zone to be recognized (Entire zone, Prefix, From To Prefix and suffix).

Enter desired parameters in appropriate field and click on the **Accept** button. The new zone will appear in the first window opened in **3**. Repeat the operation to create new zones or select one and click on the **Delete** button to delete it or on the **Edit** button to modify it.

4 Click on the **Accept** button from the window shown in **3**.
5 Click on the **Close** button from the window shown in **2**.

5.2.14 Editing fields for boxes

1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on **Edit**->**Field Definition**->**Box**. The following window appears.



Note : The window displayed for files contains extra fields 68 that can be added to the *File* module and a **More** button that allows to specify its mask and value (see definition of mask criteria in the glossary 229).

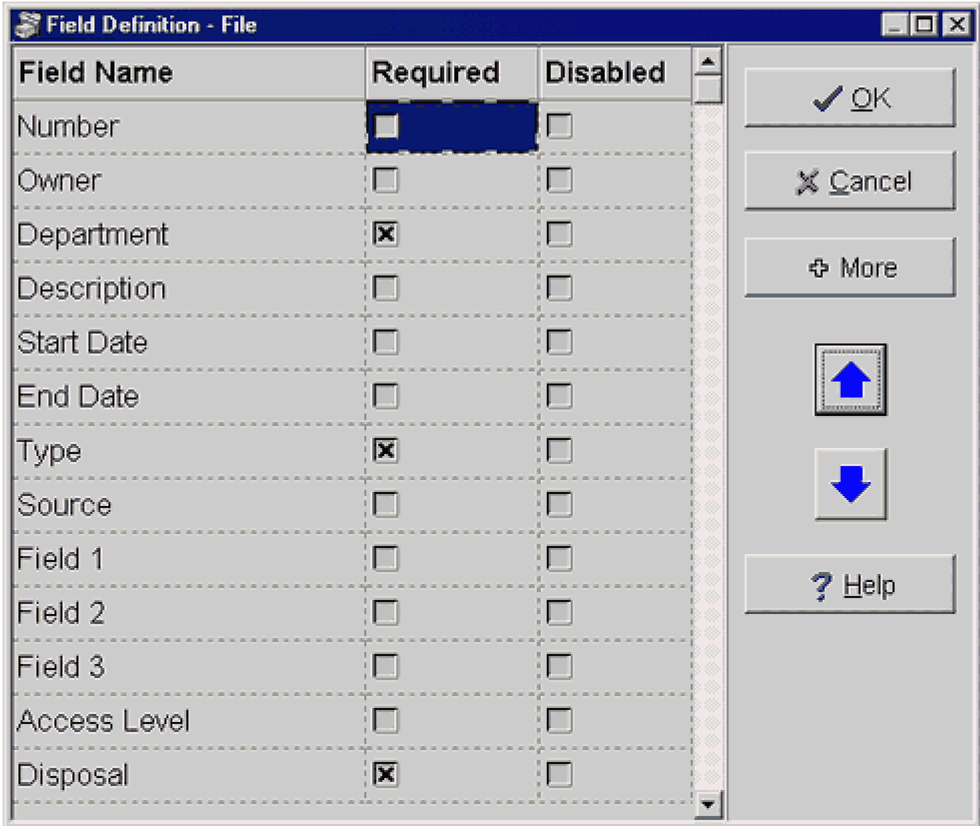
3 Perform one of the following operations :

- To set a field as required, check the **Required** box for the corresponding field.
- To deactivate a field, check the **Disabled** box for the corresponding field.
- To set a field as optional, do not check any box.

4 To set up the fields tabulation order on an entry form, select a field and move it to the desired position using the **Up-Arrow** and **Down-Arrow** buttons.

5.2.15 Editing or adding fields for files

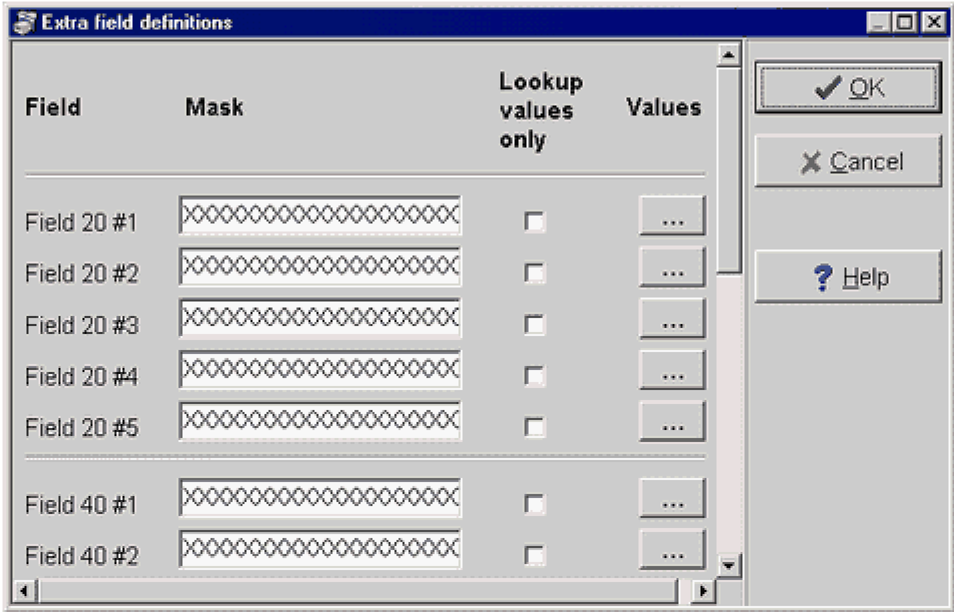
1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on **Edit**->**Field Definitions**->**File**. The following window appears.



Note : The original label of a field indicates its capacity. For example, *Field 20 #1* means that this field can contain a maximum of 20 characters.

3 To add an extra field, select its line and uncheck the "Disabled" box, then check the "Required" box if so desired.

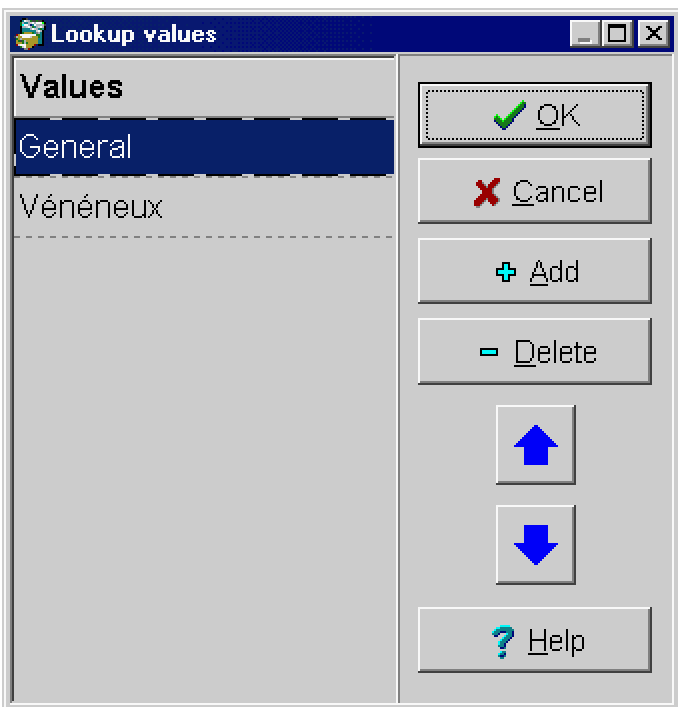
4 Click on the **More** button to specify its field mask and to enter values that will be available in its drop-down list. The following window appears.



5 Enter a mask for the desired field.

Note : A mask represents a chain of rules that must be kept when entering a value in the field.

6 Click on the button to the right of the extra field to enter values that will be available in its drop-down list. The following window appears, indicating already defined values.



- To add a value, click on the **Add** button.
- To delete a value, click anywhere on the line to be erased and click on the **Delete** button.
- To modify display order of the values, select one and move it to the desired position using

the **Up-Arrow** and **Down-Arrow** buttons.

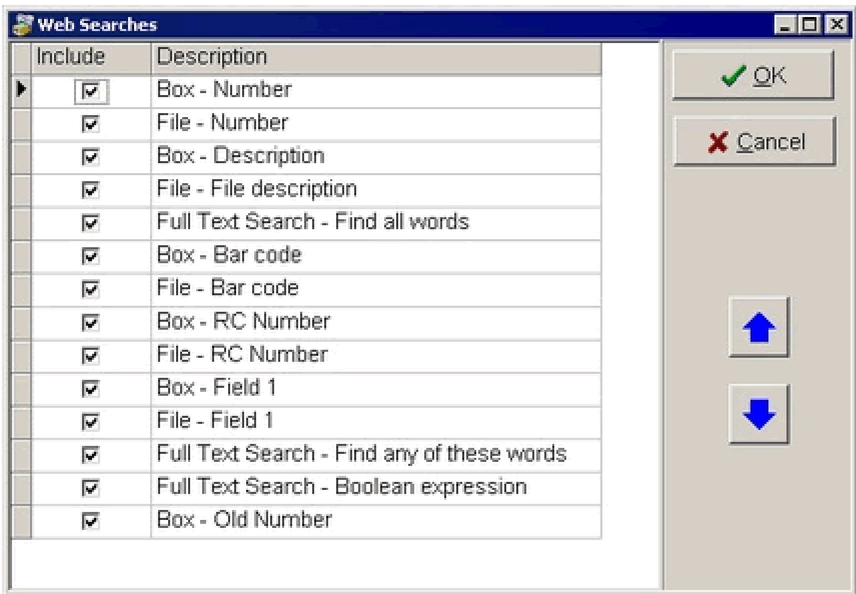
6 When previously defined values must be only entered on the field, check the *Lookup values only* box in the window opened in **4**.

Note : Set to "Top" or "Bottom" the *Position of Extra field* in *Customer Information*, depending on the position that extra fields must have in the *File* module. Extra fields are created for internal using and can be renamed in the *English and French Text* 47 module.

5.2.16 Editing the Web Search parameters

These parameters will organize the customer's list of search parameters on the web if they have an Internet access to EDC (ActiveWeb). To see which report was set by default for the web search results see the Creating, deleting and configuring custom reports 59 topic.

1 Click on **Customer**->**Customer Information** from the *Main window*.
2 Click on **Edit**->**Web Searches**. A window appears.



3 Edit the order or the content of the list :

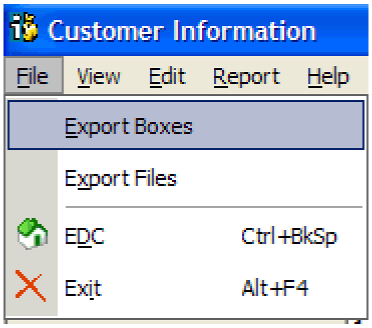
- To exclude a specific field from the list, uncheck the *Include* check box situated beside the field description.
- To change the order of apparition of the different fields, select the field you want to move (an arrow situated at the left of the field indicates the selected field) and use the direction arrows at the right of the window to set the appropriate position.

4 When all the changes to the parameters have been done, press **OK**.

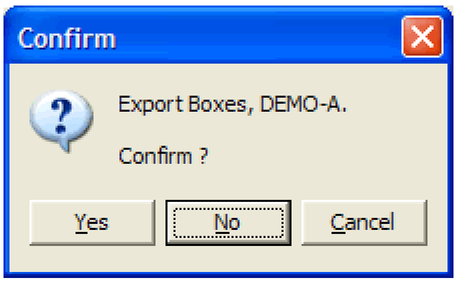
5.2.17 Exporting Customer Inventory

You can export the inventory (box and/or files) of a customer if needed. Here's how you proceed:

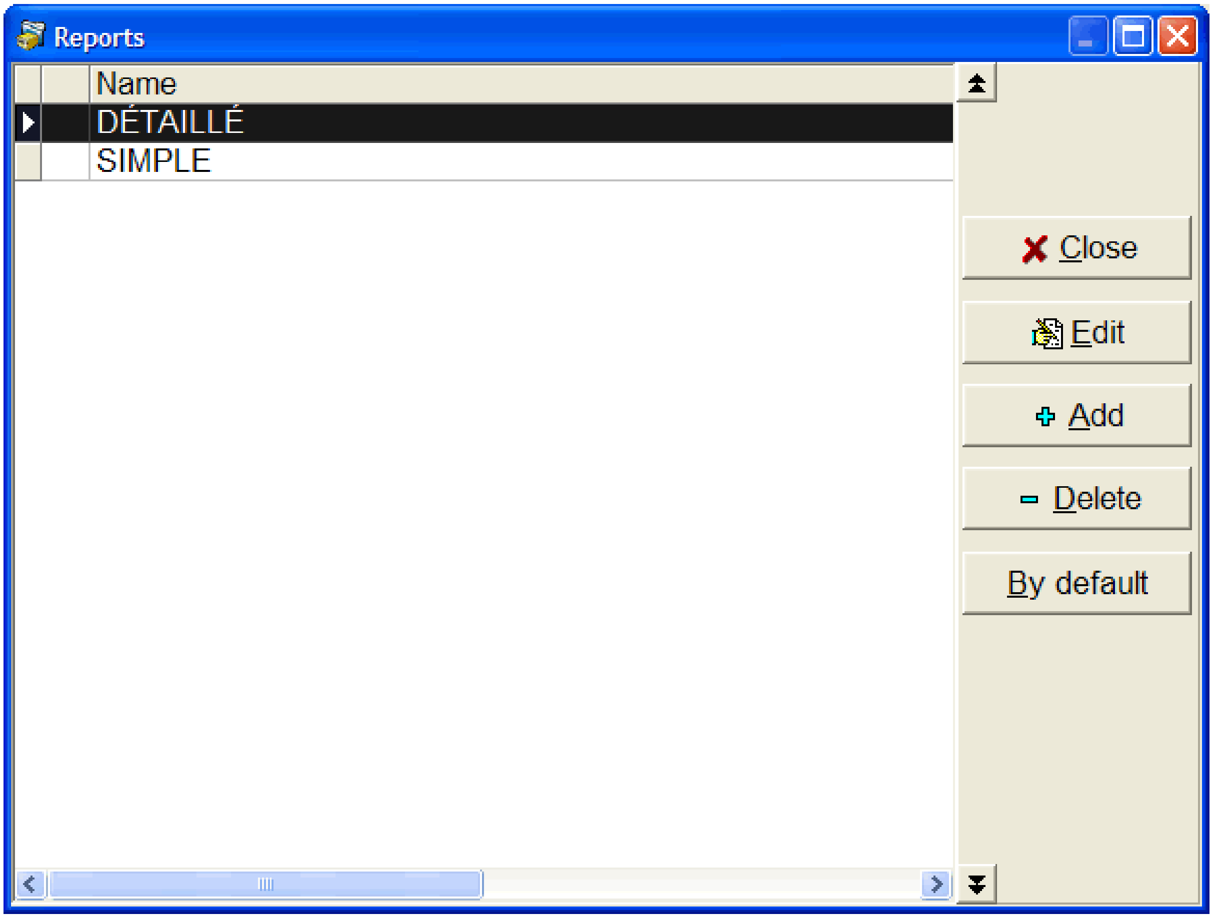
1- Go to the "Customer Information" module and go "File -> Export Boxes | Export Files" like so:



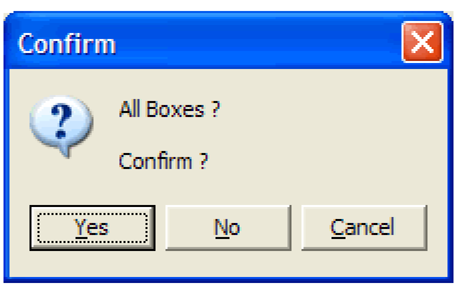
2- Then confirm your choice:



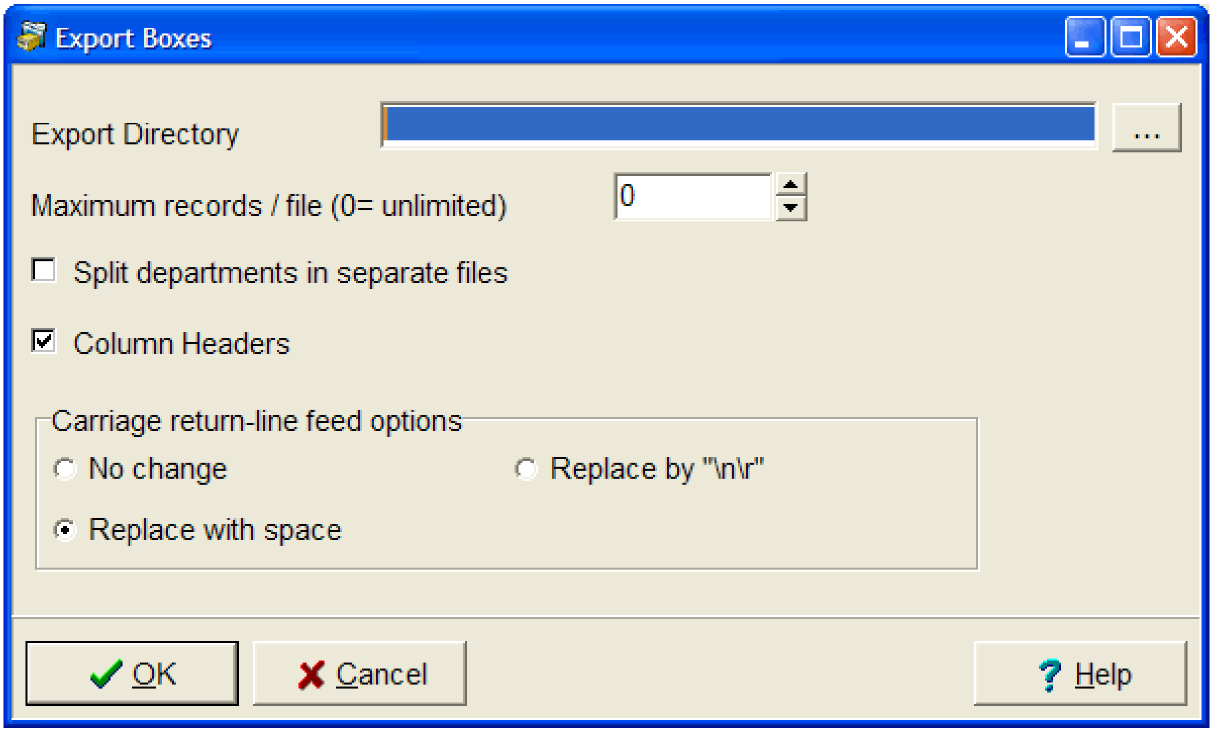
3- Next you are asked to choose the level of information (which fields) you need exported. You can choose from some already made reports as shown below or create a new one with the "Add" button.



4- Once you have chosen which fields to export, EDC asks you if you want to export all items or just some:



5- Then you need to choose to which directory you wish to export the data to and also are asked about some other export options:



Note: The "Carriage return-line feed options" are usually alright as they are and pertain mostly to NOTES when viewed through excel or imported to another system.

Note: If you need the notes to be viewed or entered exactly as they are now in EDC it is best to change this option to "No Change".

5.3 Source Location

5.3.1 Overview (Source Location)

This module allows to consult and edit the information of source locations. New locations can also be created. Source locations are generally used to specify where the box came from (*Source* field in the *Box* module) before arriving at the in-house or off-site record center.

Available report

- list of source locations

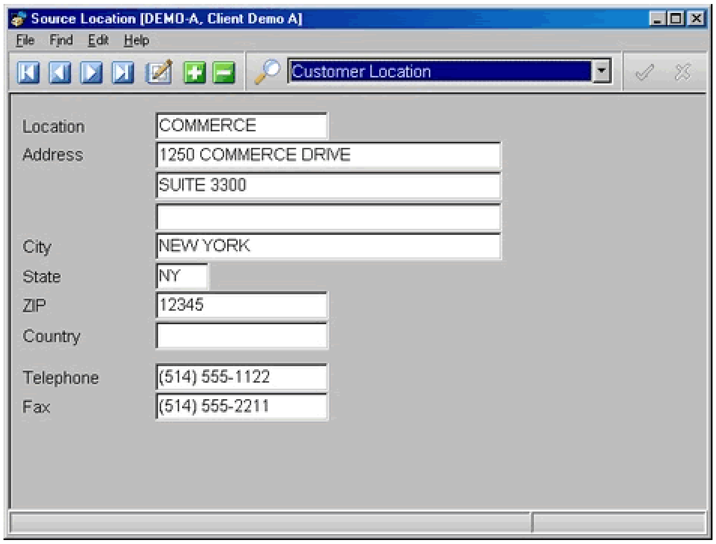
Fields 75 (see the next section)

Tasks

- Creating new source locations 75
- Editing source locations 75

- Deleting source locations 75
- Viewing or printing a list of source locations 75

Module's window



5.3.2 Fields (Source Location)

Location
Required alphanumeric field containing a maximum of 10 characters.
Indicates the location's code. This value will be displayed in the drop-down list associated with the *Source* field of the *Box* module.

Location's coordinates
Optional alphanumeric fields.
Details of the location's coordinates.

5.3.3 Creating new source locations

1. Click on **Customer**->**Source Location** from the *Main window*.
2. Click on the **Add** button.
3. Enter the data in the appropriate fields and click on the **Accept** button.

5.3.4 Editing source locations

1. Click on **Customer**->**Source Location** from the *Main window*.
2. Select the source location to be modified and click on the **Edit** button..
3. Modify the data in the desired fields and click on the **Accept** button.

5.3.5 Deleting source locations

1. Click on **Customer->Source Location** from the *Main window*.
2. Select the source location to be deleted. and click on the **Delete** button.
3. Confirm the operation by clicking on the **Yes** button of the confirmation box that is displayed.

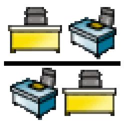
5.3.6 Viewing or printing a list of source locations

1. Click on **Customer**->**Source Location** from the *Main window*.
2. Click on **File**->**View report|Print report**.
3. The report is automatically displayed or printed.

5.4 Department

5.4.1 Overview (Department)

This module allows to consult and edit the information about departments and sub-departments, as well as the retention period when the conservation policy is calculated according to departments (the *Retention* field of the *Customer Information* module needs to be set as 'Sub-Department'). New departments and sub-departments can also be created. This information will be used to categorize boxes and files.



Available report

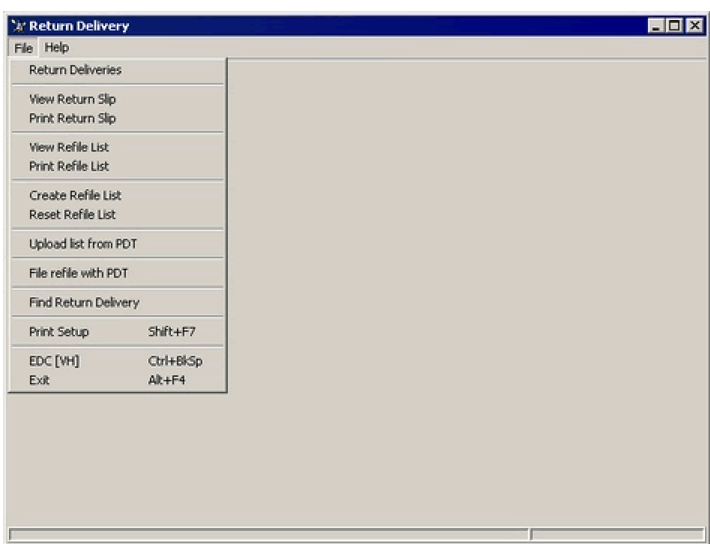
- list of departments, including sub-departments

Fields 76 (see the next section)

Tasks

- Creating or editing departments and sub-departments 77
- Deleting a department 77
- Transferring documents of a sub-department to another department 78
- Transferring documents of a sub-department to an existing sub-department 78
- Viewing or printing a list of departments and their sub-departments 78

Module's window



5.4.2 Fields (Department)

Department
Required alphanumeric field containing a maximum of 30 characters.
This field indicates the department's name. This value will appear in the drop-down lists associated with the *Department* field in the *Box* and *File* modules.

Supervisor and Address
Name and address of the supervisor of the department.

Coordinator and Address
Name and address of the coordinator of the department.

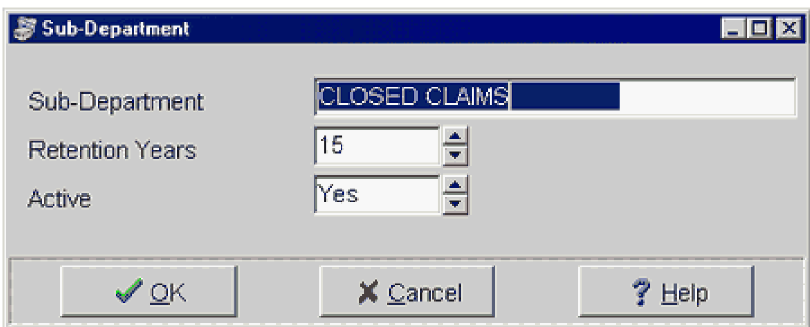
Sub-Departments
Required alphanumeric field containing a maximum of 30 characters.
List of the sub-departments for the department.

5.4.3 Creating or editing departments and sub-departments

1 Click on **Customer**->**Department** from the *Main window*.
2 Make one of these operations :
 - To add a department, click on the **Add** button.
 - To modify a department, select a department and click on the **Edit** button.
3 In the *Department* section, add or modify the information in the appropriate fields.
4 In the *Sub-Departments* section, perform one of the following actions :

 - to add a sub-department, click on the **Add** button.
 - to modify a sub-department, select it and click on the **Edit** button.

A window is displayed; enter the appropriate information in the different fields.



Note : When adding a new sub-department, the current window does not contain any information.

5 Enter the name of the sub-department, the number of retention years for documents included in this sub-department (effective only when the conservation policy of the organization is based on departments) and specify if this sub-department is active or not and press **OK**.
6 Click on the **Accept** button of the module to save all the information entered here.

Note : Sub-departments cannot be deleted, they can only be set as inactive (this was done for tracking purposes). Inactive sub-departments cannot be attributed to documents; it is necessary to define at least one active sub-department.

5.4.4 Deleting a department

In order to delete a department, it must not be assigned to any box or file.

1 Click on **Customer**->**Department** from the *Main Window*.
2 Click on **Edit**->**Delete** or click on the **Delete** button from the icon bar. A window appears.

3 To accept the deletion of the department press *Yes*; to cancel the operation press *No* or *Cancel*.

Note: An error message will appear if the selected department is assigned to an item. One must do a search to find all the boxes and files related to that department and change their departments before successfully performing the operation.

5.4.5 Transfering documents of a sub-department to an existing sub-department

This operation will move documents from a sub-department to an other existing sub-department. The documents are added to the content of the target sub-department and the source sub-department is not deleted from the system.

1 Click on **Customer**->**Department** from the *Main Window*.
2 Click on **Edit**->**Transfer**->**Sub to Sub-Department**. A window appears, containing the list of existing sub-departments.
3 Select the source sub-department and press **OK**. Another window is displayed, also containing the list of the existing sub-departments.
4 Select the destination sub-department and press **OK**. The transfer is automatically done in the system.

Note : This operation may take some time if the involved sub-department contains many documents.

5.4.6 Transfering documents of a sub-department to another department

This operation will simply move the sub-department from its department to a different department. The target department must not contain a sub-department with the same name. The original sub-department will be erased from its original department. For example, the "Oswald" sub-department must be moved from the "Current Affairs" department to the "Archived Affairs" department.

1 Click on **Customer**->**Department** from the *Main Window*.
2 Click on **Edit**->**Transfer**->**Sub to Main Department**. A window appears, containing the list of existing sub-departments.
3 Select the source sub-department (ie "Oswald") and press **OK**. Another window is displayed, containing the list of the existing departments.
4 Select the destination department (ie "Archived Affairs") and press **OK**. The transfer is automatically done in the system. The source sub-department is automatically deleted in the system for the original department.

Note: This operation may take some time if the involved sub-department contains many documents.

5.4.7 Viewing or printing a list of departments and their sub-departments

1 Click on **Customer**->**Department** from the *Main Window*.
2 Click on **File**->**View Report|Print Report**.

3 The report is automatically printed or displayed on the screen.

5.5 Retention Schedule

5.5.1 Overview (Retention Schedule)

This module allows to consult, edit and create document types. These document types are mainly used to classify records. They are also used to calculate the disposition date, as well as the disposal type of documents (effective only when the organization's conservation policy, defined in the *Customer Information* module, is based on document types).

It is possible to edit notes related to document types and to associate restrictions, departments or sub-departments to these document types.

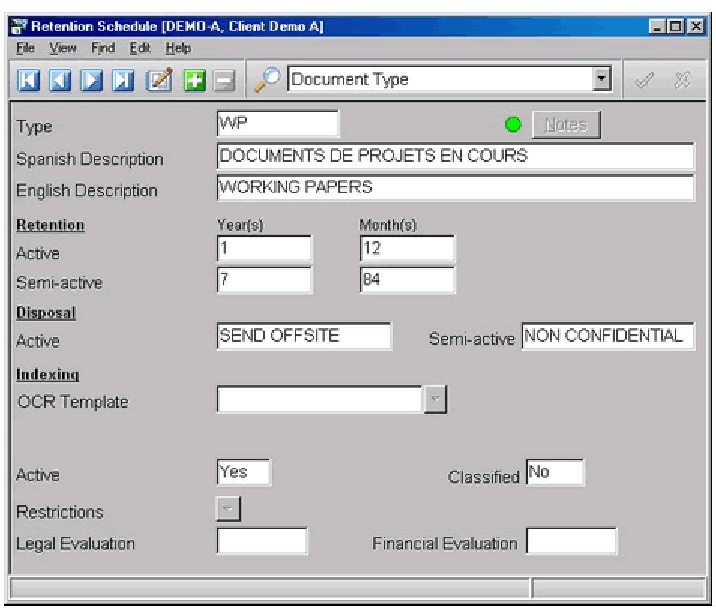
Available report

- list of document types

Tasks

- Creating or editing a document type 81
- Transferring documents from a document type to another 82
- Creating or editing document type notes 82
- Adding or removing restrictions from a document type 82
- Viewing the restrictions or notes associated with a document type 83
- Viewing or printing a list of document types 83

Module's window



5.5.2 Fields (Retention Schedule)

Type
Required alphanumeric field containing a maximum of 10 characters.
This field indicates the name of the document type. This value will appear in the drop-down list associated with the *Type* field of the *Box* and *File* modules.

French Description and English Description
Optional alphanumeric fields containing a maximum of 80 characters each.
These fields give the French and the English description of the document type.

Retention

Active
Numeric field containing values up to 999 years or 11 988 months.
This field indicates the active retention 229 period for boxes and files of the selected type.

Semi-Active
Required numeric field containing a value up to 999 years or 11 988 months.
This field indicates the semi-active retention 229 period for boxes and files of the selected type.

Note : If the conservation policy is based on document types and the conservation periods are modified, the system will ask if the disposal dates for the boxes and files have to be updated. If it is the case, the system may be busy for a while if many documents are associated with the types that have been modified.

Disposal

Active
Drop-down field that can contain the values described below .
This field indicates the manner in which the documents will be disposed of at the end of their active retention period.

Semi-active
Drop-down field that can contain the values described below.
This field indicates the manner in which the documents will be disposed of at the end of their semi-active retention period.

Here are the different disposal modes for both active and semi-active fields:

- **CONFIDENTIAL**

These documents will be destroyed in a confidential manner.

- **NON-CONFIDENTIAL**

These documents will be destroyed in a non-confidential manner.

- **NONE**

A disposal mode has not yet being determined.

- **PERMANENT**

These documents will never be destroyed.

- **REVISION**

These documents will be placed on a list so that they can undergo a special verification before being destroyed.

- **SAMPLE**

These documents will be placed on a list so that samples can be extracted before destroying the remaining items.

- **SEND TO DEPOT**

Here are the two possible situations:

1. Active documents will be transformed to semi-active documents and will be transferred to the semi-active storage area.

2. The semi-active documents will generally be transferred to the permanent archiving facility.

Indexing

OCR Templates
Drop-down field.
This field indicates the template that will be used for the auto-indexing of the images. The templates are defined in the *Customer Information* 54 module.

Active
Choice field 229 containing "Yes" or "No".
When the field is set to "No", the type is inactive and cannot be associated to documents.

Classified
Choice field containing "Yes" or "No".
This field indicates that the document is considered as classified.

Restrictions
Drop-down field containing the values defined in the *Restriction* 83 module.
This field indicates the restrictions associated with the selected type.

Legal Evaluation
Optional alphanumeric field containing a maximum of 4 characters.
This field indicates how long the document needs to be kept from a legal point of view. This field is for internal use.

Financial Evaluation
Optional alphanumeric field containing a maximum of 4 characters.
Indicates how long the document needs to be kept from a fiscal point of view. This field is for internal use.

Department
This field contains the department that will automatically be attributed to a document of the selected type.

Note : This field is visible only if the *Types by department* field of the *Customer Information* module is set to "Yes".

5.5.3 Creating or editing a document type

1 Click on **Customer**->**Retention Schedule** from the *Main Window*.
2 • To create a document type, click on the **Add** button.
  • To modify a document type, select it and click on the **Edit** button.
3 Enter or modify the information in the appropriate fields.
4 Click on the **Accept** button. When accepting modifications, window appears to edit notes.
5 Enter the note and press **OK**.

5.5.4 Transfering documents from a document type to another

This operation allows to transfer all the documents from a document type to another one.

1 Click on **Customer**->**Retention Schedule** from the *Main Window*.
2 Click on **Edit**->**Transfer**. A window is displayed, containing the list of the document types.
3 Select the source document type and press **OK**. Another window appears.
4 Select the target document type and press **OK**.

Note: This operation may take some time if the document type involved contains many documents.

5.5.5 Editing document type notes

1 Click on **Customer**->**Retention Schedule** from the *Main Window*.
2 Select the document type to which a note must be added or edited.
3 Click on **Edit**->**Notes**. A window appears and allows to enter some text.
4 Enter the note and press **OK**.

5.5.6 Adding or removing restrictions from a document type

Restrictions are used for certain documents that have a retention schedule assigned but for which they do not necessarily conform, they serve as exceptions. Restrictions are then created and assigned to these specific documents to make sure they will not be destroyed at the same time as the others.

1 Click on **Customer**->**Retention Schedule** from the *Main Window*.
2 Select the document type to which some restrictions must be associated.
3 Click on the **Edit** button.
4 Click on the drop-down button beside the *Restrictions* field. The following window appears, containing the restrictions already associated to the document type.

5 • To add a restriction, click on the **Add** button, select a restriction in the list that is displayed and click on the **Accept** button from the list.
• To delete a restriction, select the restriction (it will appear highlighted) and click on the **Delete** button.
6 Repeat step **5** to add or delete several restrictions.
7 Click on the **Close** button.
8 Click on the **Accept** button to terminate the operations.

5.5.7 Viewing the restrictions or notes associated with a document type

1 Click on **Customer**->**Retention Schedule** from the *Main Window*.
2 Select the document type for which notes and restrictions must be viewed using the button bar.
3 Click on **View**->**Notes|Restrictions**.
4 According to the choice made previously, the appropriate window is displayed. Click on the **Close** button to go back to the module.

5.5.8 Viewing or printing a list of document types

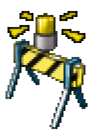
1 Click on **Customer**->**Retention Schedule** from the *Main Window*.
2 Click on **File**->**View Report|Print Report**.
3 The report is automatically printed or displayed on the screen.

5.6 Restriction

5.6.1 Overview (Restrictions)

Restrictions are used to prevent a semi-active document from being inadvertently put on a disposal list. All semi-active documents associated with a restricted type will be preserved as long as the restriction is in place, unless they are specifically put on a disposal list. Disposal lists for specific restrictions can be produced through the *Disposal List* module.

This module allows to edit, view or print information about restrictions and enables the addition or deletion of restrictions. A restriction must be associated to a document type in the *Retention Schedule* 79 module.



Available report

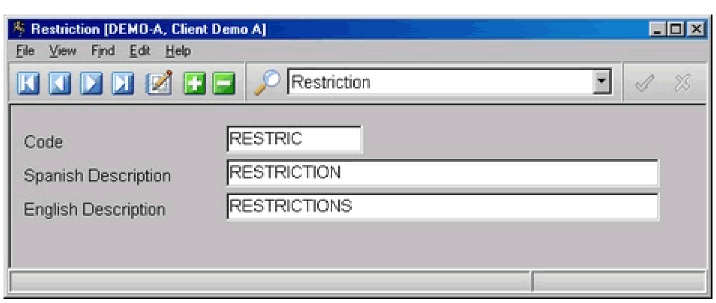
- list of restrictions

Fields 84 (see the next section)

Tasks

- Creating or editing a restriction 84
- Deleting a restriction 84
- Viewing or printing document types associated with a particular restriction 84
- Viewing or printing a list of restrictions 84

Module's window



5.6.2 Fields (Restrictions)

Code
Required alphanumeric field containing a maximum of 10 characters.
This field indicates the name (the code) of the restriction. This value will appear in the drop-down list associated with the *Restrictions* field of the *Retention Schedule module*.

French Description/English Description
Required alphanumeric fields containing each a maximum of 80 characters.
These fields indicate the description of the restriction both in English and French.

5.6.3 Creating or editing a restriction

1 Click on **Customer**->**Restriction** of the *Main Window*.
2 • To create a restriction, click on the **Add** button.
  • To edit a restriction, select the restriction and click on the **Edit** button.
3 Enter the information in the appropriate fields.
4 Click on the **Accept** button to confirm the addition or the changes.

5.6.4 Deleting a restriction

1 Click on **Customer**->**Restriction** from the *Main Window*.
2 Select the restriction and click on the **Delete** button.

Note: A restriction must be removed from all document types containing it before being deleted from the system.

5.6.5 Viewing or printing document types associated with a particular restriction

1 Click on **Customer**->**Restriction** from the *Main Window*.
2 Select the desired restriction and click on **View**->**Document Types**.
3 A window is displayed on the screen, indicating all the document types associated with the restriction.

Note : The list can be printed by clicking on the **Print** button from the report's window.

5.6.6 Viewing or printing a list of restrictions

1 Click on **Customer**->**Restriction** from the *Main Window*.
2 Click on **File**->**View Report|Print Report**.
3 The report will automatically be printed displayed on the screen.

5.7 Delivery Address

5.7.1 Overview (Delivery Address)

This module allows to view or print information of delivery addresses when the organization is linked electronically or by internet with an off-site record center. These addresses are entered in the system at the off-site record center.

This module is for consultation only.

Available report

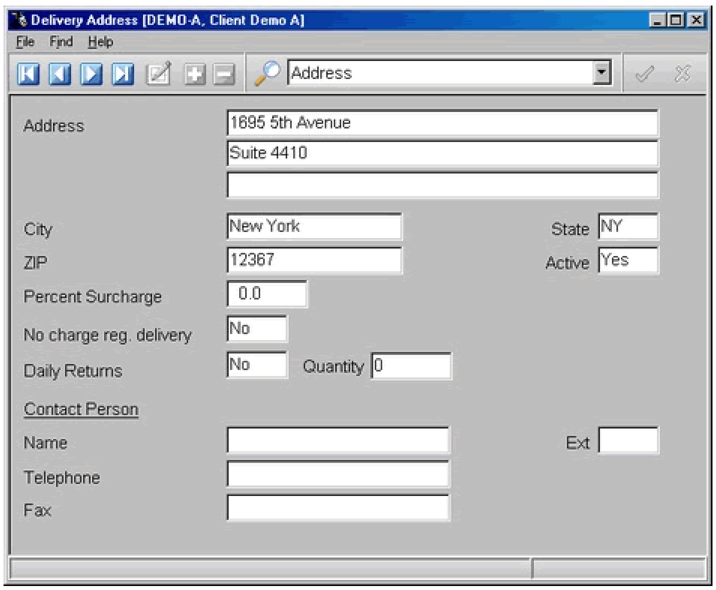
- list of delivery addresses

Fields 85 (see the next section)

Task

- Viewing or printing a list of delivery addresses 85

Module's window



5.7.2 Fields (Delivery Address)

Address/City/Province/Postal Code
These fields indicate the exact coordinates of the delivery address.

Percent Surcharge
This field shows fees that will be added to the regular delivery charge for this address.

No charge reg. delivery
When this field is set to "Yes", the regular deliveries will not be charged.

Daily returns / Quantity
When this field is set to "Yes", the organization plans ahead of sending a fix amount of boxes back to the record center on a daily basis.

Contact Person
This field represents the coordinates of the person responsible for deliveries at this address.

5.7.3 Viewing or printing a list of delivery addresses

1 Click on **Customer**->**Delivery Address** of the *Main Window*.
2 Click on **File**->**View Report|Print Report**.
3 The report is automatically printed or displayed on the screen.

6 Inventory management

6.1 Outline (Inventory)

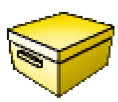
Inventory management is at the core of ***EDC Client*** software; in fact, the system is able to give at any moment the state of a box or a file, as well as its detailed history. The follow-up of a document is done for the entire duration of the document's life at the record center or at your organization. In addition, the system facilitates the search of a box or file as well as enabling you to perform modifications on the item's information. One can also dispose of an item, in accordance with its storage cycle.

6.2 Box and File

6.2.1 Overview (Box and File)

For practical reasons, the *Box* and the *File* modules are combined in a single chapter. This is done since most operations performed on boxes are also available for files. Furthermore, the File module is not available in the ***semi-active, boxes only*** edition of the ***EDC*** software.

These modules allow to consult or to modify the information of boxes and files. Furthermore, if the content of a box has been inventoried, it is possible to consult the list of its files. Finally, these modules allow to add or remove boxes and files from the inventory, and to print bar code labels for boxes and files.



Available reports (*Box* module)

- list of all boxes
  - by number, by old box number, by description, by owner, by internal location, by field 1, by field 2, by field 3, by department or by sub-department
  - on department, on sub-department, on activity or on type
- list of all boxes that are out, either by date, by recipient or for a recipient
- detailed information for each box
- list of boxes for a specific period and according to their entry date in the system

Available reports (*File* module)

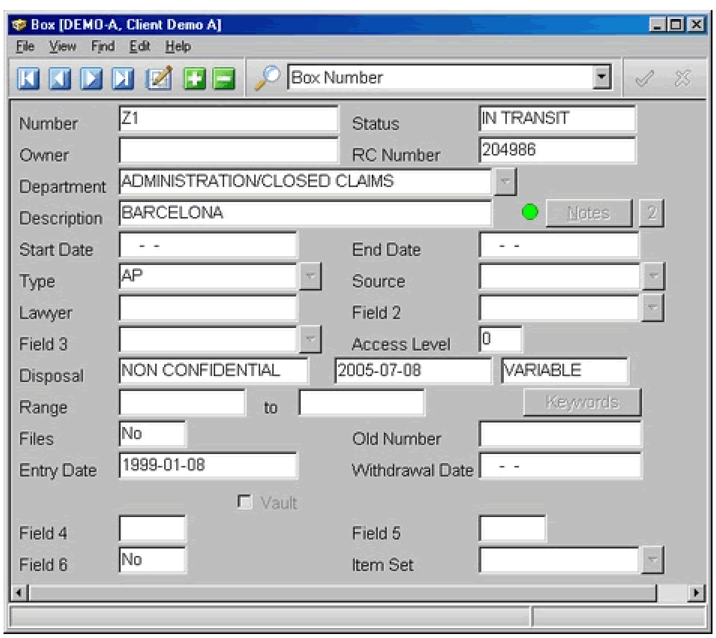
- list of all files
  - by number, by description, by owner, by field 1, by field 2, by field 3 or by disposal date
  - on department, on sub-department, on activity, on box, on type for a sub-department or on type for all files
- list of all files that are out
- detailed information for each file
- list of files for a specific period and according to their entry date in the system

Fields (see the next section)

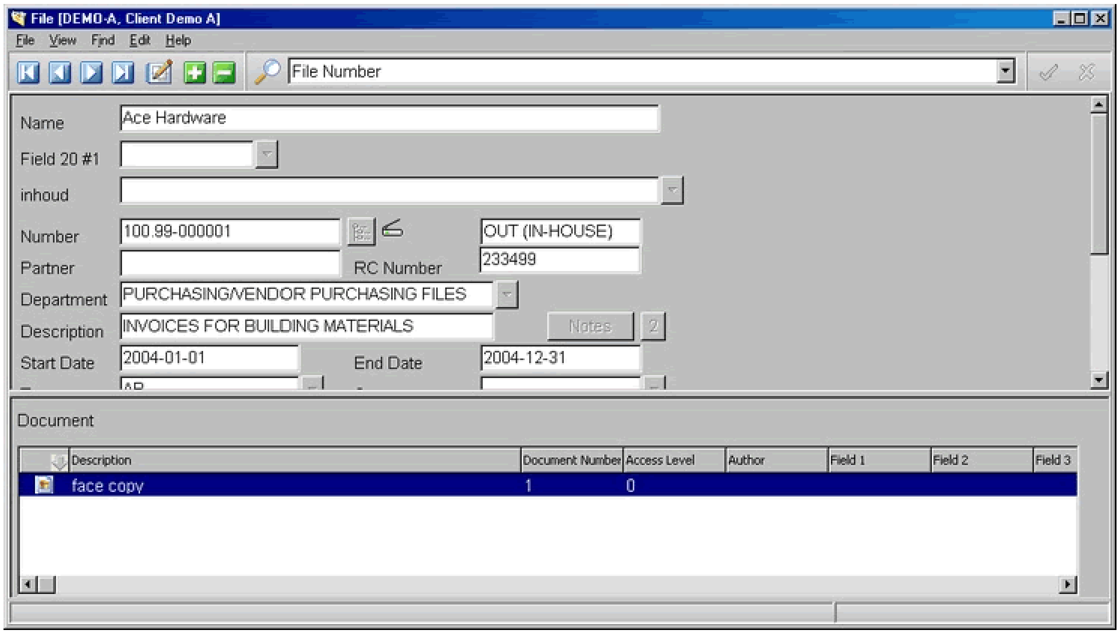
Tasks

- Adding a box or a file to the active inventory 91
- Adding a box or a file to the semi-active inventory 92
- Adding an electronic file 92
- Batch adding files to the inventory 93
- Deleting a box or a file 94
- Editing the information of a box or a file 95
- Finding a box or a file 95
- Printing a detailed report of boxes or files 95
- Printing bar code labels for boxes or files 96
- Printing the thermal label of a box or a file 98
- Reactivating a box or a file to the active inventory 98
- Reactivating a box or a file to the semi-active inventory 98
- Sending the updated information of a box or a file to the offsite record center 99
- Viewing the files of a box 99
- Viewing the history of a box or a file 99
- Viewing or editing notes for a box or a file 99
- Viewing or printing a list of boxes or files 100
- Viewing or printing a list of boxes or files that are out 102
- Batch indexing 102
- Adding items to an item set or viewing items of an item set 105
- Printing Imaging separator images 106
- Viewing and adding keywords 107
- Copying and adding a box or file 107
- Managing electronic documents 108

Window of the *Box* module



Window of the *File* module



Note: These fields are customizable, so it is possible that they do not entirely correspond to the fields in your software.

6.2.2 Fields (Box and File)

Number
Required alphanumeric field containing a maximum of 20 alphanumeric characters.
This field contains the number assigned to the box or the file. The following values are all valid: 100, 100-01-01, TB-00002. To get them sorted numerically (example: 000001, 000002, 000133, ...), it is necessary to right-string numbers with "0"s.

Note : This field is optional for the *File* module.

Classification plan (*File* module only)
...

State
This field is read-only.
This field indicates the current state (activity can also be used) of a box or a file. This field is automatically updated to reflect the operations made on boxes or files.

Owner
Optional alphanumeric field containing a maximum of 20 characters.
This field indicates to whom the box or the file belongs to.

RC Number
Unique read-only numeric field.
This field indicates the number automatically attributed to a box or a file. It is used internally by the system for tracking purposes.

Department / Sub-department
Required drop-down alphanumeric fields containing a maximum of 30 characters each.
These fields indicate to which department and sub-department a box or file belongs to. For example, CLAIMS/CLOSED CLAIMS indicates that the box is in the CLOSED CLAIMS

sub-department of the CLAIMS department.
To edit this value, it is necessary to type in the first letters of the department and to press the **Down-Arrow** or click on the drop-down button to display the list of the departments that match the typed letters.

Note : Departments and sub-departments are defined by the *Department* 76 module.
If the organization's conservation policy uses departmental retentions, the disposal dates will be determined from the retention associated with the sub-departments. The conservation policy is defined in the *Retention* field 55 located in the *Customer Information* module.

Description
Optional alphanumeric field containing a maximum of 40 characters.
This field contains the description of the document.

Notes
Optional alphanumeric field containing a maximum of 65 pages of characters (approximate pages number).
To edit this field, use the **Edit**->**Notes** access path or click on the **Notes** button in the edit mode.

Start Date / End Date
Optional fields with a pre-defined date format that can be modified (see the *Date Mask* field in the *System Information* module).
These fields are used to specify the start and the end dates of a box or a file. These fields are useful when the content of a box or a file has a specific defined period. The disposal date will be calculated by adding the conservation period to the end date (when it is present).

Type
Required drop-down alphanumeric field containing a maximum of 10 characters.
This field describes the document type of the retention schedule by which a box or a file is controlled. Its value can be edited the same way as the *Department* field.

Note : The document types are defined in the *Retention Schedule* 79 module.
If the organization's conservation policy uses document type retentions, the disposal date will be determined from the retention associated with the document type.

Source
Optional alphanumeric drop-down field containing a maximum of 10 characters (non-associated to a drop-down list for the *File* module).
In the case of boxes, this field indicates the location where the box came from before arriving at the off-site record center. As for files, this field is reserved for the internal use.

Note : The source locations are defined in the *Source Location* 74 module.

Field 1, Field 2, Field 3
Optional alphanumeric fields containing a maximum of 20 characters each.
These fields are for internal use and can be renamed in the *English and French Text* 47 module to fit the organization's needs.

Access Level
Numeric field containing a value between "0" and "9".
The access level is used to prevent unauthorized users from editing or ordering boxes with access restriction. "9" is the most restrictive access. When editing the field, the user can only assign a value less than or equal to his own level. If the access level of a user is less than the box access level, the user is not allowed to edit or order it.

Note : See the *Authorized User* 40 module.

Disposal
There are three sub-fields related to disposal :

A first choice sub-field containing the values "CONFIDENTIAL 230", "NON-CONFIDENTIAL 230", " NONE 230", "PERMANENT 230", "REVISION 230", "SAMPLE 230" or "SEND TO DEPOT 230". This sub-field indicates the disposal mode used for the concerned document types.

A second sub-field indicating a disposal date for witch the format is defined in the *System Information* 50 module. The box or file will be reviewed on the disposal date. If the disposal is set to "VARIABLE" in the next sub-field, then :

- the disposal date of an active document corresponds to the active conservation period added to the *End Date* (when present) or to the *Entry Date* field value;
- the disposal date of a semi-active document corresponds to the semi-active conservation period added to the active conservation period witch is added to the *End Date* (when present) or the *Entry Date* field value.

A third choice sub-field containing the values "FIXED" or "VARIABLE". If "FIXED" is selected, the disposal date will not be controlled by the organization's conservation policy 229, but will be the one entered manually in the field. When this field is set to "VARIABLE", the revision date will be calculated from either the department's or the document type's retention, depending on the organization's conservation policy. By setting this field to "VARIABLE", any updates to a department or a document type's retention will automatically adjust the disposal date of all the related boxes and files.

Range
Fields possessing a mask 229 defined in the *Interval Mask* 55 field of the *Customer Information* module.
Interval of documents contained in a box or a file. This field is reserved for the internal use.

Files (*Box* module only)
Read-only field that can contain "Yes" or "No".
When this field indicates "Yes", it means that the box contains inventoried files.

Box (*File* module only)
Drop-down field associated to the list of boxes in inventory.
Indicates the number of the box that contains the file.

Box/Shelf (*File* module only)
Drop-down field.
Indicates the box or the shelf where the active file is stored. The box number must correspond to a box in the "IN (IN-HOUSE)" state. The shelf must first be defined in the *Internal Location* 147 module.

Old Number
Read-only alphanumeric field containing a maximum of 16 characters.
When the box number is modified, the old number will be displayed in this field for reference. If the number is changed a second time, then the original number will not be retrievable.

Entry Date
Read-only date field possessing a pre-defined format that can be modified (see the *Date Mask* field in the *System Information* module).
The entry date is first set when a box is entered in "IN (IN HOUSE)" or "IN TRANSIT". When the box is received at the record center, the entry date is modified to reflect this last date.

Withdrawal Date

Read-only date field possessing a pre-defined format that can be modified (see the *Date Mask* field in the *System Information* module).
Date when the box or file has been removed from the inventory.

Volume (*Box* module only)
Numeric field of the following format 999.9 229.
Number of square feet occupied by the box.

Vault (*Box* module only)
This box can be checked off to indicate that the record must be stored in the vault. This will have an effect when a location will be chosen for the record.

Location (*Box* module only)
Alphanumeric field that can contain up to 20 characters.
For the active or the imaging versions of the software, this field indicates the location of the active box within the organization. This field is then associated to a drop-down list and its values are defined in the *Internal Location* 147 module.
When ***EDC*** is linked with an off-site record center, this field is read-only and indicates the location of the semi-active box at the off-site record center.
If the off-site record center does not use ***EDC***, the tracking of boxes will be done by editing the contents of this field to reflect its location within the off-site record center. Furthermore, ***EDC*** allows to track the movement of boxes by using the *Circulation* 194 module.

***Item set**
Drop-down field associated to a list defined in the current module.
This field allows to associate an item to an item set. When one item associated to an item set is ordered, all the available items associated to that set are ordered.
To associate an item to an item set, simply select an item set in the drop-down list or add a new set manually by entering a description.

Note : It is possible to associate the files of a box to different sets, even if none of these sets is the same as the box set. When a file is ordered in a box and the box is not granted to the same set, only that file and the other files of the same set are added to the order. Nevertheless, when a box is ordered, all the files into that box are ordered indiscriminately.

Extra fields (*File* module only)
These fields can be added and defined in the *Customer Information* module (see Editing or Adding fields for files 68). One can also specify their position 57 in the same module.

6.2.3 Adding a box or a file to the active inventory

1. Click on **Inventory**->**Box|File** from the *Main window*.
2. Click on **Edit**->**Add In-House**.
3. Fill in the appropriate fields (the fields in red are required fields).
4. Click on the **Accept** button.
5. Repeat steps **3** and **4** as often as necessary.
6. Click on the **Cancel** button to terminate the data entry.
7. Print bar code labels for newly added documents (see "Printing bar code labels for boxes or files 96").

There is another way to add active documents to the inventory. From the *Box and File Maintenance* module, it is actually possible to auto-create printed files (see "Auto-create printed files 176"). The auto-creation of printed files adds files in the inventory for which the state is "PRINTED". These files can then be added in the active inventory in the following manner :

1. Click on **Inventory**->**File** from the *Main window*.

2 Make a search for a pre-printed files under its RC number (RC number is displayed on the label printed at the time of the auto-creation).

Note : The search can also be done by number, because the RC number was attributed as a default number to the pre-printed file.

3 Click on **Edit**->**Edit**. The information related to the file can then be edited.
4 Enter a new number in the *Number* field if desired.
5 Enter the box or the shelf number where the file will be stored in the *Box/Shelf* field.
6 Click on the **Accept** button. The system automatically updates the data and the file is added to the active inventory. The file will change from the "PRINTED" to the "IN (IN-HOUSE)" state.

6.2.4 Adding a box or a file to the semi-active inventory

Adding a box or a file

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Click on **Edit**->**Add IN TRANSIT** 229.
3 Enter the information in appropriate fields (the red fields indicate the required information.)
4 Click on the **Accept** button.
5 Repeat steps **3** and **4** as often as necessary.
6 Click on the **Cancel** button to terminate the data entry.
7 Print bar code labels for newly added records (laser labels 96 or thermal labels 98).
8 Click on **Orders**->**Order** from the *Main window* to indicate to the off-site record center that boxes have to be picked-up.
9 Click on **File**->**Create Order**.
10 Click on the drop-down button to the right of the *Delivery Type* field and select the desired time.
11 Click on the drop-down button to the right of the *Delivery Address* field and select the desired pick-up address.
12 Click on the **Special Instructions** button, enter instructions if desired and click on the **Accept** button.
13 Click on the **Box Returns** button, enter a quantity and click on the **Accept** button.
14 Click on the **Accept** button from the module's window.
15 A dialog box appears, displaying the transmission progress of the current order. Once the order is accepted, its items are displayed in the *Order* module. A warning message is displayed when an article is rejected from the order. The reason for the rejected articles can be consulted later in the *Order* module

Adding an open shelf file

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Click on **Edit**->**Add IN TRANSIT** 229 **Shelf**.
3 Repeat steps **3** to **15** of the previous section.

6.2.5 Adding an electronic file

An electronic file is used to keep track of electronic documents within the organization. For more information on how to manage electronic documents please refer to the Managing electronic documents 108 chapter.

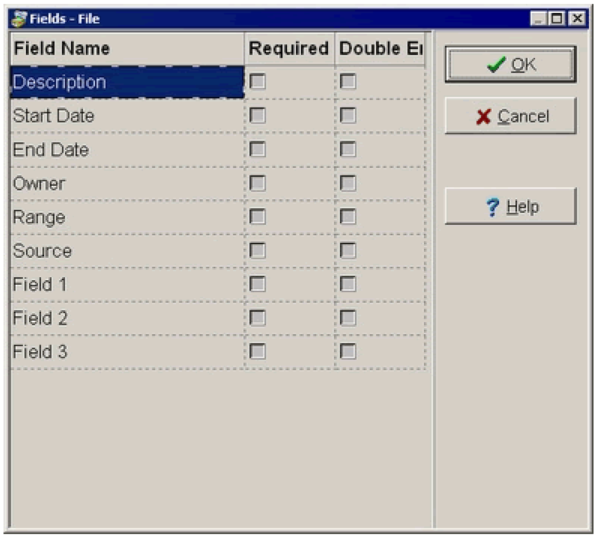
1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Click on **Edit**->**Add Electronic**
3 Enter the information in appropriate fields (the red fields indicate the required information.)
4 Click on the **Accept** button.
5 Repeat steps **3** and **4** as often as necessary.
6 Click on the **Cancel** button to terminate the data entry.

Take note that an electronic file cannot be ordered, it can only be managed.

6.2.6 Batch adding files to the inventory

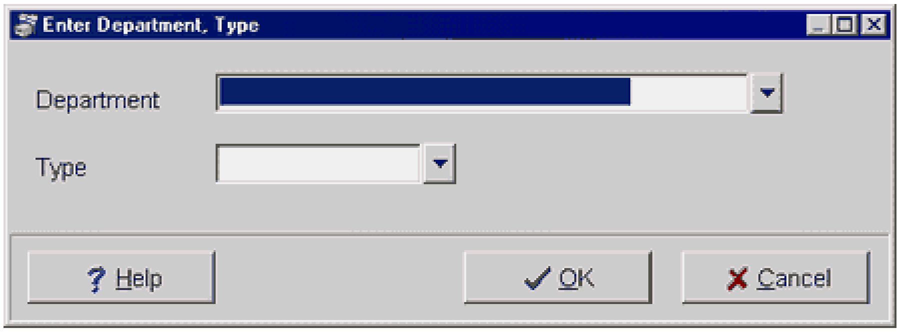
This option, only available in the *File* module, allows to add a batch of files to the inventory with the same operation.

1 Click on **Inventory**->**File** from the *Main window*.
2 Click on **Edit**->**Batch Addition**. A window appears and asks to choose a customer.
3 Enter the code of the customer in question and press **OK**. Another window is displayed.

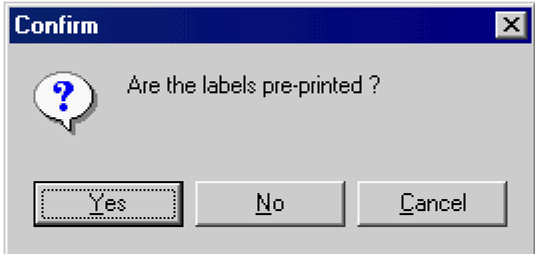


Note: When the double entry check box is selected beside a field, one will have to enter the data twice in each field that is required.

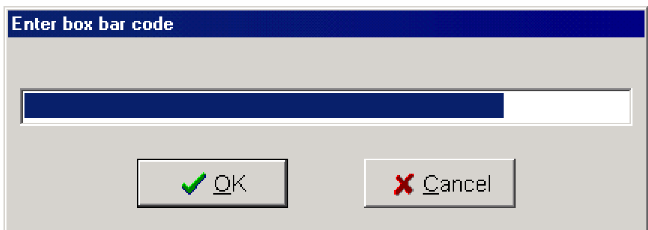
4 Check off the file fields for which a value must be entered and press **OK**. A third window opens on the screen.



5 Enter a department and document type for the new files (use the choice buttons to choose a value in the list) then click on the **OK** button. A dialog box appears.



6 If the files have already been created and have a bar code, click on the **Yes** button. If not, click on the **No** button. A window opens.



7 Enter the bar code of the box where the files will be stored and press **OK**. Two different situations are then possible:

- If **Yes** has been chosen in **5**, a window appears and asks to enter the bar code of a file. Proceed, enter values for the required fields in the boxes which are displayed and repeat the operation to add other files in the same box. Click on the **Cancel** button when finished. The files are automatically added to the inventory in the related box. The window opened in **6** reappears and allows to repeat the operation for another box.

- If **No** has been chosen in **5**, a window appears for every required field and allows to enter the desired values. Proceed as many times as necessary and click on the **Cancel** button when finished. The window opened in **6** reappears and allows to add files into another box. Proceed if so desired or click on the **Cancel** button to end the operation. The files are automatically added to the inventory.

Note : The files can only be added into boxes whose state is IN (IN-HOUSE), IN TRANSIT.

6.2.7 Deleting a box or a file

1 Click on **Inventory**->**Box|File** from the *Main Window*.
2 Find the desired box or file 95.
3 Click on the **Delete** button. A window appears.

4 Confirm the deletion by clicking on the **Yes** button.

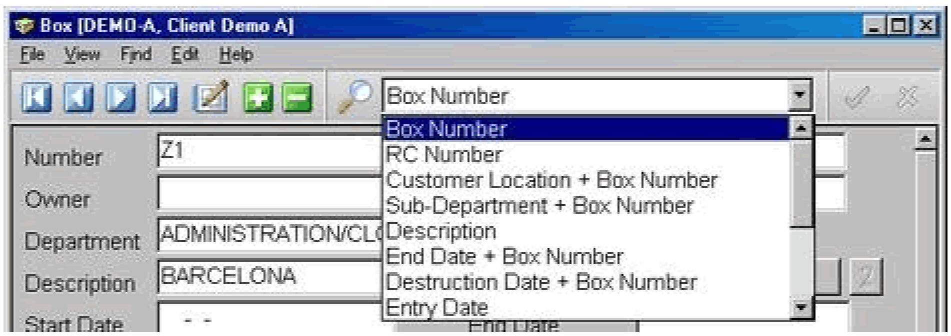
Note: Only active documents in the state "IN (IN-HOUSE)" and the semi-active documents in the state "IN TRANSIT" can be deleted.
The internal deletion of a record is irreversible. This operation will also delete the document's notes and history. All these information can not be recuperated.

6.2.8 Editing the information of a box or a file

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Find the desired box or file 95.
3 Click on **Edit**->**Edit**.
4 Edit the appropriate information. (see "Fields 88" in the *Box* and *File* modules for more details)
5 Click on the **Accept** button to save the changes in the system.

6.2.9 Finding a box or a file

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Choose a way to find the item by selecting an index on the button bar 17 as follows :



3 Click on **Find**->**Find** and enter the information to look for.

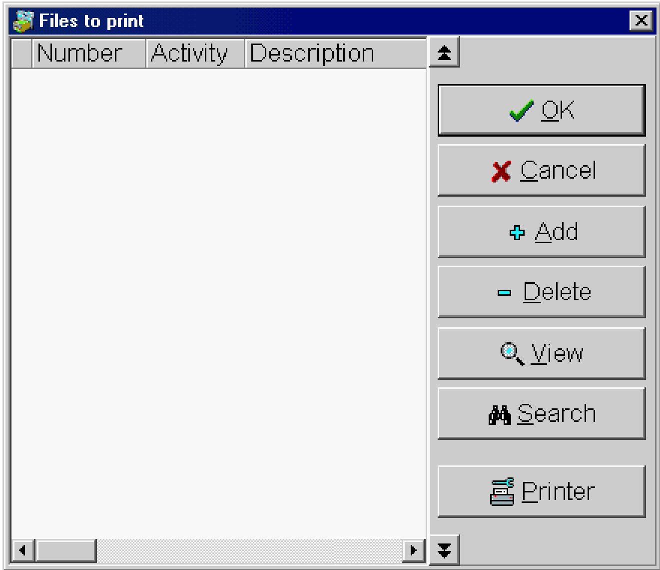
Note : The cursor moves to the fields of the search index selected in step **2**.

4 Click on the **Accept** button.
5 The system displays what is more similar to the searched item. If the item sought is close to the item displayed in the module, it will be easy to find it by scrolling the list.
6 Click on **Find**->**Scroll**. The list of the items will be displayed, starting with the current item.
7 Scroll the items by using the **Up-Arrow** and the **Down-Arrow** buttons.
8 Double-click on the desired item and it will appear in the module's entry form.

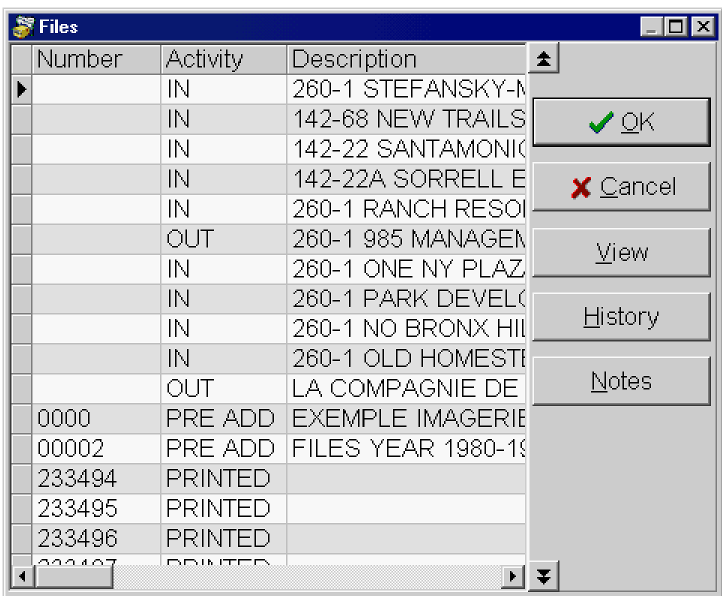
6.2.10 Printing a detailed report of boxes or files

The current rubric indicates how to print a detailed report of boxes and files, that includes their history and their notes.

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Click on **File**->**Print Box Details|Print File Details**. The following window appears.



3 Click on the **Add** button. A dialog box is displayed for files and asks if the selection will be done by description. Click on the **Yes** button of this dialog box if so desired.
4 Enter a number or a description in the window that appears and click on the **Accept** button. Select the desired items on the list that is displayed as follows.



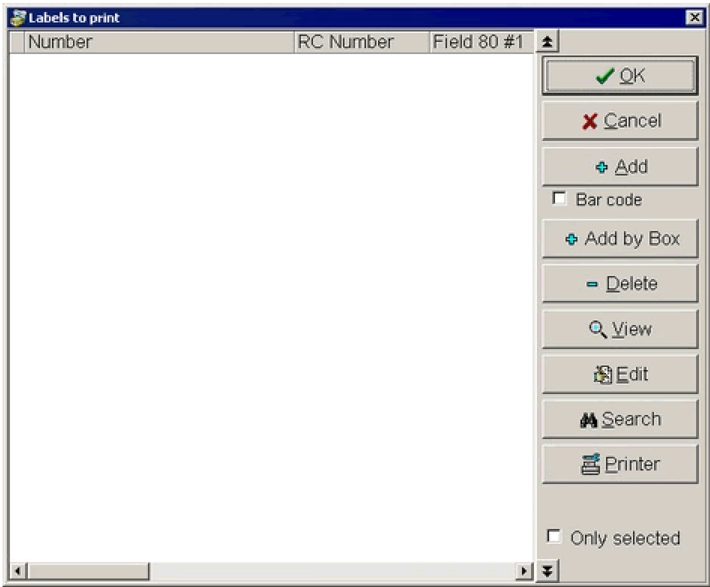
5 The selected items will appear highlighted. Click on the **Accept** button when the selection is done.
6 The system goes back to the window displayed in **2** and all the selected items are present. It is possible to add new items by repeating steps **3** to **5** or to delete item by clicking on the **Delete** button.
7 Click on the **Accept** button to start the printing of the report.

6.2.11 Printing bar code labels for boxes or files

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Click on **File**->**Print Setup** and select the "Manual paper feed" source to charge labels in the

printer.

3 Click on **File**->**Print Laser Labels**. A window is displayed on the screen.



4 Click on the **Add** button. For files, press *Yes* in the window that appears if you want to select files by description.

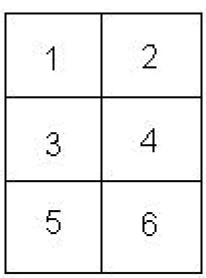
5 Enter a number or a description in the new window to indicate where to start in the list and click on the **Accept** button. The list of items appears.

6 Select the desired items (they will appear highlighted) and click on the **Accept** button.

7 The system goes back to the window displayed in **2**; all the selected items are on the list. It is possible to add new items by repeating steps **4** to **6** or to delete items by selecting items (they will appear highlighted) and by clicking on the **Delete** button.

8 Click on the **Accept** button to start the printing. In the *Box* module, a window appears and asks if labels for files also have to be printed.

9 A dialog box is displayed to select the first label (see the following image). Enter a number and click on the **Accept** button.



Note: Typical page of Avery labels used to print box or file labels. The numbers indicate the printing order of the labels. See the list of supported Avery labels 61 in the rubric "Defining custom labels for boxes and files".

10 The labels are automatically printed.

Note: To print labels for documents entered in the system for a specific period, make a search for those dates by clicking on the **Find** button of the window displayed in **3** and select the desired items in the list of found items.

6.2.12 Printing the thermal label of a box or a file

1. Click on **Inventory**->**Box|File** from the *Main window*.
2. Search for the desired item.
3. Click on **File**->**Print Thermal Labels** (F7)
4. The label will automatically be printed.

6.2.13 Reactivating a box or a file to the active inventory

1. Click on **Inventory**->**Box|File** from the *Main window*.

Note : To reactivate all the files within a box, reactivate the box.

2. Select the desired box or file 95.
3. Perform one of the following series of actions :
   - To transfer a box from the "IN TRANSIT" or the "DELETED" state to the "IN (IN-HOUSE)" state.
     1. Click on **Edit**->**Transfer to In House** (*Box* module).
     2. Confirm the transfer.
     3. Select an internal location.

   - To transfer all the files of a box from the "IN TRANSIT" or the "DELETED" state to the "IN (IN-HOUSE)" state.
     1. Click on **Edit**->**Transfer Files to In House** (*Box* module).
     2. Confirm the transfer.
     3. Select an internal location.

   - To transfer files in the "IN TRANSIT", the "OUT" or the "DELETED" state to the "IN (IN-HOUSE)" state.
     1. Click on **Edit**->**Transfer to In House** (*File* module).
     2. Confirm the transfer.
     3. Select an internal location.

Note : When deleting a semi-active document, its information is not deleted in the system. The reactivation restarts the tracking process, keeping the old history of documents.
Menu options are only available when actions are effective for the document, according to its state. For example, the menu item *Transfer to IN TRANSIT* will not be available for a document in the "IN TRANSIT" state.

6.2.14 Reactivating a box or a file to the semi-active inventory

1. Click on **Inventory**->**Box|File** from the *Main window*.
2. Select the desired box or file 95.
3. Perform one of the following actions :
   - To transfer a box from the "DELETED" state to the "IN" state.
     1. Click on **Edit**->**Transfer to IN TRANSIT** (*Box* module)
     2. Confirm the transfer.
     3. Select the files to be reactivated.

   - To transfer a file from the "DELETED" state to the "IN" state.
     1. Click on **Edit**->**Transfer to IN TRANSIT** (*File* module).
     2. Confirm the transfer.
     3. Enter the box number to which the file will be transferred (the box must be in the "IN TRANSIT " or the "OUT" state).
4. Return boxes to the offsite record center 204. State of boxes will be changed to "IN" once they have been processed by the record center.

6.2.15 Sending the updated information of a box or a file to the off-site record center

This operation allows to send the information entered for a box or a file to the off-site record center immediately (when the organization is linked electronically to an off-site record center).

Normally, this operation does not need to be performed since the changes on boxes or files are updated by the software at a pre-defined moment every day. It can be useful when the organization needs to update information immediately for a specific reason.

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Click on **Edit**->**Refresh With Record Center**. A dialog box appears.

3 Click on the **Yes** button and the changes will be transmitted instantly to the off-site record center.

Note : The ***EDC*** replication program must be opened before processing.

6.2.16 Viewing the files of a box

From the *Box* module

1 Click on **Inventory**->**Box** from the *Main window*.
2 Find the desired box 95.
3 Click on **View**->**Files**.

From the *File* module

1 Click on **Inventory**->**File** from the *Main window*.
2 Choose the *Box* search index.
3 Click on **Find**->**Find** and enter a box number.
4 Click on the **Accept** button.
5 The *File* module displays the first file found. To view other files in that box, navigate with the button bar 17 or the keyboard 17.

6.2.17 Viewing the history of a box or a file

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Find the desired box or file 95.
3 Click on **View**->**History** 229.

6.2.18 Viewing or editing notes for a box or a file

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Find the desired box or file 95.
3 Click on **Edit**->**Notes**.
4 Edit the information in the window that appears.
5 Click on the **Accept** button to save the modifications.

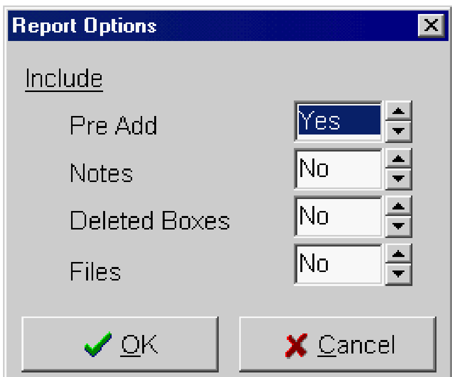
Note : The notes of a box or a file can be viewed by clicking on **View->Notes** in the appropriate module.

6.2.19 Viewing or printing a list of boxes or files

From the *Box* module

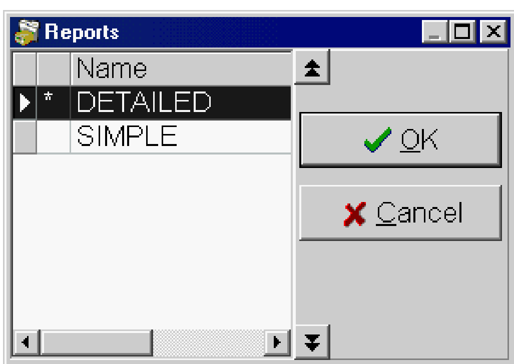
1 Click on **Inventory**->**Box** from the *Main window*.
2 Perform one of the following operations:

- Click on **File**->**Report Options**->**Report Options** to include files or notes in the report. It is also possible to include boxes or files in "IN TRANSIT 229" or "DELETED 229". A window appears.



Set the desired fields to **YES** and click on the **Accept** button.

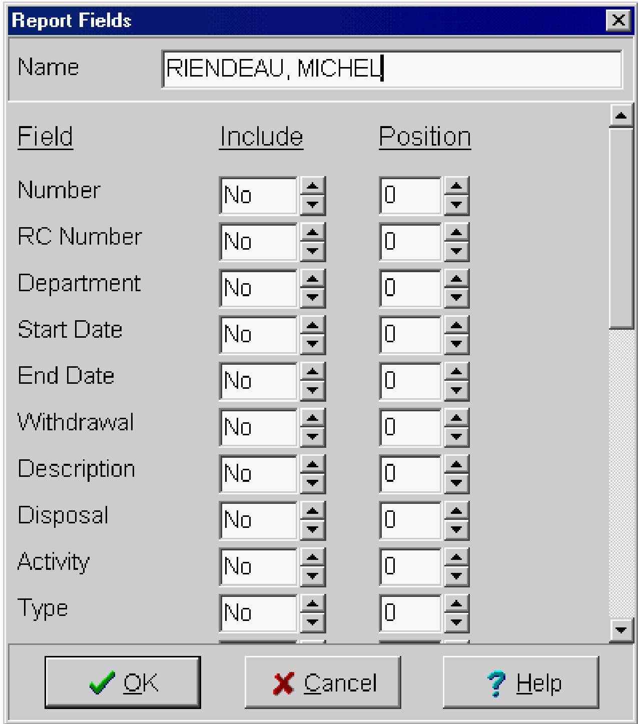
- Click on **File**->**Report Options**->**Boxes|File**->**Select Predefined Box (or File) Report** to choose a pre-defined report. A window appears.



Select a report and click on the **Accept** button.

Note : These reports are pre-defined in the *Customer Information* module (view the related topic "Creating, deleting and configuring customer reports 58").
A small mark appears in front of the default report selected.

- Click on **File**->**Report Options**->**Boxes|Files**->**Modify Box (or File) Report Fields** to modify the fields of the report (presence and position).



Set to **YES** the desired fields, specify their position in the report and click on the **Accept** button.

4 Click on **File**->**View report|Print report** and select one of the following menus :
- **By Number**.
- **By Old Number**.
- **By Description**.
- **By Owner**.
- **By Internal Location**.
- **By Field 1**.
- **By Field 2**.
- **By Field 3**.
- **By Entry Date**.
- **By department**.
- **By sub-department**.
- **On Department**.
- **On sub-department**.
- **On Activity**.
- **On Type**->**Sub-Department|Department|All Boxes**.

5 When a report is produced for the first time, it is necessary to specify which pre-defined report will be used by double-clicking on a pre-defined report in the selection. The report will be displayed or printed soon after.
6 If the report is only viewed, click on the **Close** button to close the report's window.

From the *File* module

1 Click on **Inventory**->**File** from the *Main window*.
2 Perform one of the following actions :

- Click on **File**->**Report Options**->**Report Options** and setup report options as above.
- Click on **File**->**Report Options**->**Select Predefined File Report** then proceed to the adjustments as above.
- Click on **File**->**Report Options**->**Modify File Report Fields** and modify fields as above.

4 Click on **File**->**View report|Print report** and select one of the following menu options :

- **By Number**.
- **By Description**.
- **By Owner**.
- **By Internal Location**.
- **By Field 1**.
- **By Field 2**.
- **By Field 3**.
- **By Entry Date**.
- **By Disposal Date**.
- **On Department**.
- **On Sub-department**.
- **On Activity**.
- **On Box**.
- **On Type**->**Sub-Department|Department|All Files**.

5 When a report is produced for the first time, it is necessary to specify which pre-defined report will be used by double-clicking on a pre-defined report in the selection. The report will be displayed or printed soon after.

6 If the report is only viewed, click on the **Close** button to close the report's window.

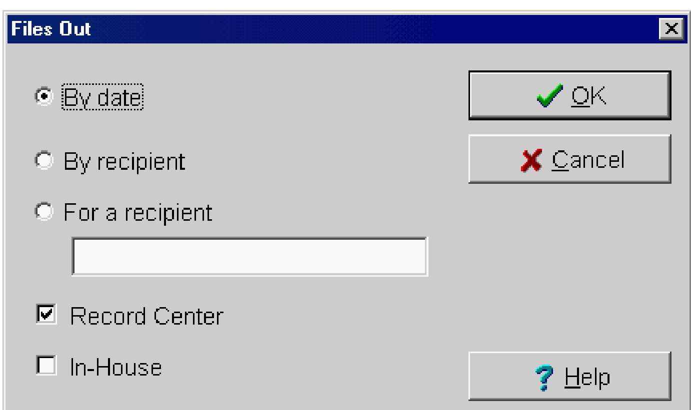
6.2.20 Viewing or printing a list of boxes or files that are out

1 Click on **Inventory**->**Box|File** from the *Main window*.

2 Click on **File**->**View report|Print Report**->**Files Out|Boxes Out**.

3 When a report is produced for the first time, it is necessary to specify which pre-defined report will be used by double-clicking on a pre-defined report in the selection.

4 When you have chosen the pre-defined report (it will appear highlighted), press **OK**. A window appears.



3 Indicate if the list must be sorted by date, by recipient or for a recipient and specify if the list is related to items that are out from the in-house or the off-site record center.

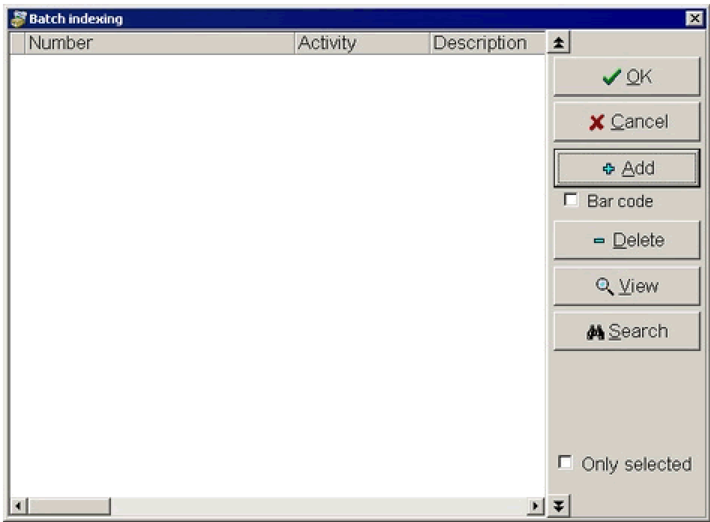
6.2.21 Batch indexing

The batch indexing section is linked with the *Full Text Search* module. When batch indexing one or many boxes, the software will not index the boxes' files. Batch indexing may take a while, and could possibly slow down ***EDC Client*** for all users (it is better to do a batch indexing during less

active periods.)

By Search

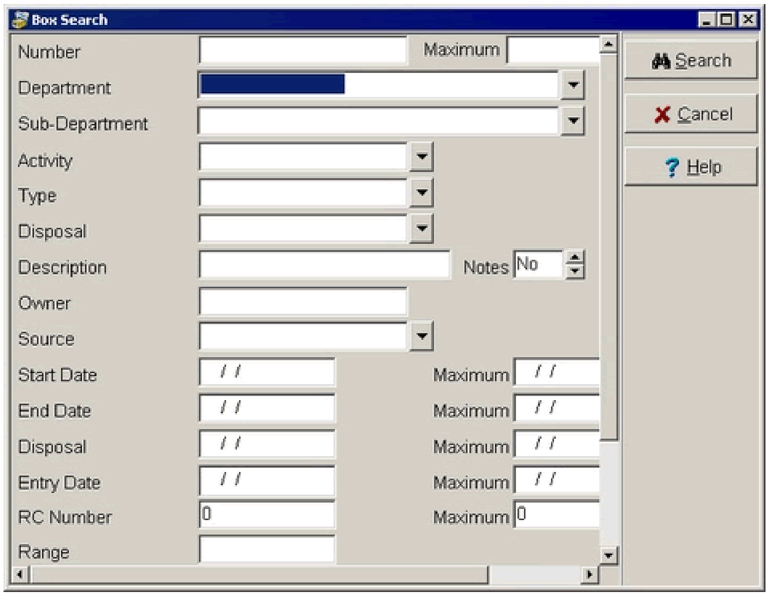
1 Click on **Inventory**->**Box|File from** the *Main window*.
2 Click on **File** ->**Batch indexing**
3 Choose a customer (to have the list of customers press **OK**, select a customer --- it will appear highlighted)
4 A window appears.



5 To index one or many boxes **|** files click on the **Add** button
6 *Boxes:* Enter a box number (to have the list of boxes press **OK** and select a box **---** it will appear highlighted) and the list of all boxes will appear.
Files: A window will appear to confirm if you want to select by description, press **Yes** to enter a description, if you press **No** the software will ask for a file number, press **OK** and the list of all files will appear.
7 Press **OK**

or

1 Press the **Search** button. A window appears.

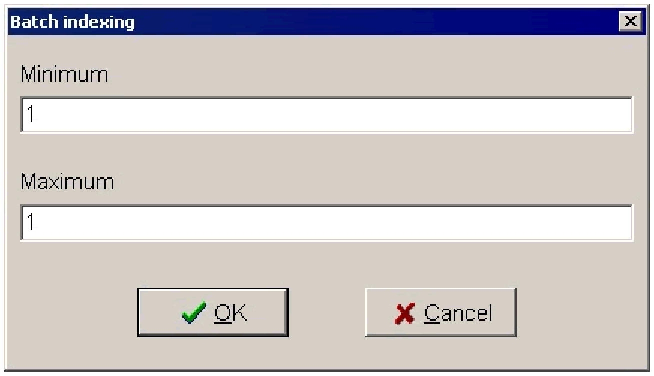


2 Enter the wanted parameters and press the **Search** button.
3 The previous window will appear containing the search results.
4 To delete certain items from the list select one or many items (they will appear highlighted) and press the **Delete** button.
5 When the list is complete press **OK** again (the software will automatically index the content of the files and boxes chosen)

*By RC number

Note: This kind of indexing can be very tricky because it does not indicate which boxes or files are indexed, therefore caution is required.

1 Click on **Inventory**->**Box|File from** the *Main window*.
2 Click on **File** ->**Batch indexing**
3 Choose a customer (to have the list of customers press **OK**, select a customer -it will appear highlighted- and press OK)
4 A window will appear



5 Choose a range of RC numbers to index. Press **OK**.
6 The system will automatically index the items wanted (the box numbers will not show).

6.2.22 Adding items to an item set or viewing items of item set

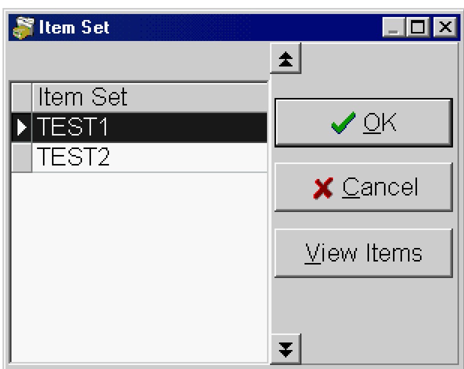
For more details about item sets, see the *Item Set* 91 field in the *Box* and *File* modules.

Creating an item set

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Select any inventoried item that can be edited and click on **File**->**Edit**. When the module is in the edition mode, move the cursor to the *Item Set* field and enter a name for your item set in the drop down field.
3 When all the changes have been performed for that item, click on the **Accept** button. The item set you have created will automatically be added to the list.

Adding an item to an item set

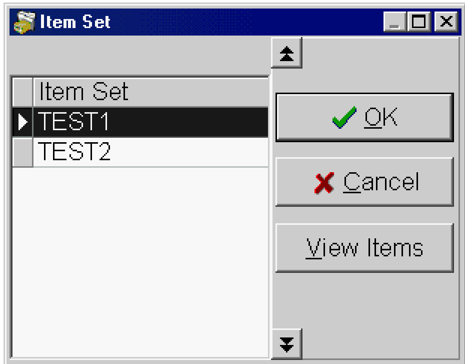
1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Select any inventoried item that can be edited and click on **File**->**Edit**. When the module is in the edition mode, move the cursor to the *Item Set* field and click on the drop down button located to the right of that field. A window appears.



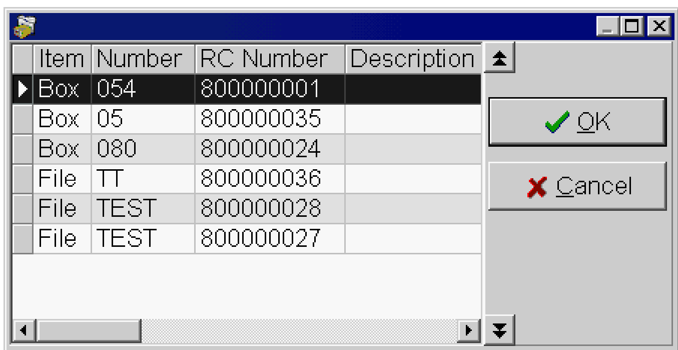
3 Select the item set of your choice, and press **OK**.
4 When all the changes have been performed for that item, click on the **Accept** button.

Viewing items of an item set

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Select any inventoried item that can be edited and click on **File**->**Edit**. When the module is in the edition mode, move the cursor to the *Item Set* field and click on the drop down button located to the right of that field. A window appears.



3 Select an item set whose items must be viewed (it will appear highlighted) and click on the **View Items** button. Another window opens.

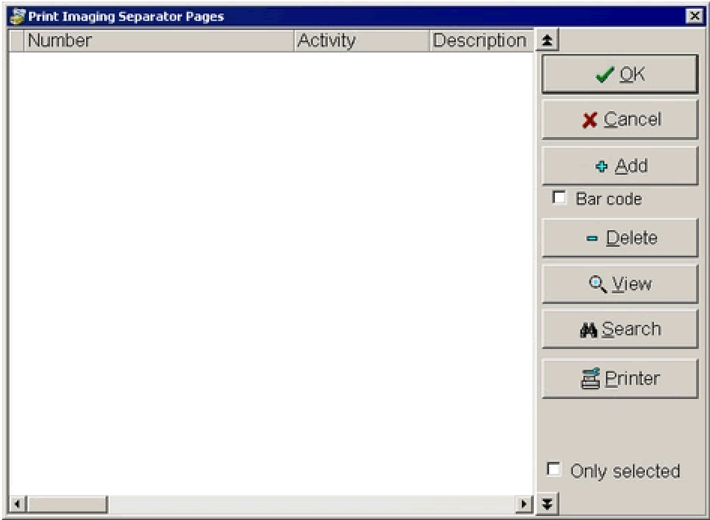


4 This window displays the list of all the items associated to the item set. Click on the **OK** button to end the viewing and to go back to the window opened in **2**.
5 If desired, repeat the operation for another item set or click on the **OK** button to have access to the other fields.
6 When all the changes have been performed for that item, click on the **Accept** button.

6.2.23 Printing Imaging Separator Pages

This option is used to import images easily into ***EDC Client***; it is especially useful when a third party scans images for the company. First, a separator page is printed for each file, then the imaging software will scan the page and the images, in order to return a multi page tiff file named after the bar code of the file. This option is only available in the *File* module.

1 Click on **Inventory**->**File** from the *Main window*.
2 Click on **File**->**Print Imaging Separator pages**. A window appears.
3 Enter the customer key or press **OK** to have the list of customers (select a customer, it will appear highlighted, and press **OK**). Press **OK**.
4 A window appears.



5 To add a file, press **Add**.
6 A message appears: "Select by description?" Press *Yes* to accept, press *No* to select by number or press *Cancel* to abort the operation.
7 Enter the file number and press **OK** to select the starting point of the list or press **OK** to have the list of files.
8 To delete a file from the list, select the file (it will appear highlighted) and press **Delete**.
9 When the list is complete, press **OK**. The bar codes of the files will automatically be printed on the laser printer.

6.2.24 Viewing and adding keywords

Keywords are used to facilitate the Full Text Search 131.

Viewing keywords

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Search the desired item, click on **View**->**Keywords**. A window appears with the keywords of the box|file.

Adding keywords

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Search the desired item, click on **Edit**-> **Extra Keywords**. A window appears.
3 Enter the new keywords.
4 To terminate the operation and save the new keywords press **OK**. To cancel the operation and the new changes press **Cancel**.

6.2.25 Copying and adding a box or file

This operation allows to copy all the information of a box or file (description, department, type, etc.) and grant them to one or more IN TRANSIT items newly added to the semi-active inventory.

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Search the desired box or file and keep it on the screen (see "Finding a box or a file 95").
3 Click on **Edit**->**Copy and Add**. The system automatically creates a new IN TRANSIT item.
4 Click on the **OK** button to save the new item. A second item is created, similar to the one

previously. Click again on the **OK**, in order to accept this second addition, or click on the **Cancel** button to terminate the operation.

Note : When copying boxes, the number of new items has to be changed because two boxes cannot have the same number.

6.2.26 Managing Electronic Documents

6.2.26.1 Principles of Electronic Management

Where can I add and access electronic documents ?

Electronic documents can be added and accessed via the *File* module. This option is only available if the version of ***EDC Client*** is SAE (Semi-Active, Electronic). For more information on ***EDC Client*** versions please refer to the Introduction 10 topic or contact our sales representatives at sales@docudatasoft.com.

What is an electronic document ?

An electronic document is first and foremost an electronic file, which is why it is situated in the *File* module. The way it functions is very simple; a file is created in the module for tracking purposes (as if it was a physical document) and one or many electronic documents or folders are attached to the said file. Electronic documents can be searched for through the *Search* or the *Full Text Search* module.

What can we do with electronic documents ?

Any of these electronic documents or folders can be modified and saved to your convenience. Moreover, previous versions can be consulted, along with the latest one. If the document is being used by another user, one can also view who is currently consulting it.

The document's information (name, creation date, notes, keywords, etc.) can be consulted or modified at anytime.

Another great aspect of this electronic management options is that a document can be finalized, which means that it can no longer be modified. This option is mostly useful for documents that one does not wish to be able to modify, such as a final contract.

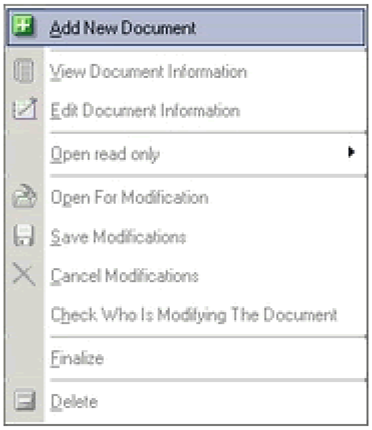
6.2.26.2 Adding a document

Adding an electronic file

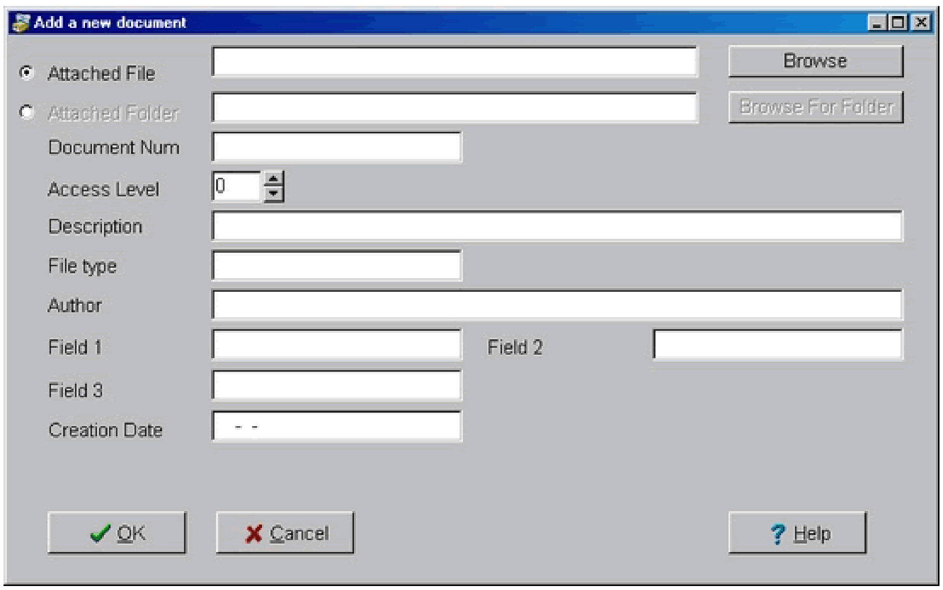
Before adding a document, a file should be created to reflect the content of the document or folder to which it will be associated. This is done for tracking purposes. See the adding an electronic file 92 topic.

Adding a document to a file

1. Click on **Inventory**->**File** from the *Main window*.
2. Find the wanted file and keep it on the screen
3. Right click in the space reserved for electronic documents. A menu appears.



4 Select *Add New Document* in the menu.
5 A window appears.



Attached File - After selecting the file via the **Browse** button, the path (or address) of the file will appear in the field.
Attached Folder - After selecting the folder via the **Browse For Folder** button, the path (or address) of the folder will appear in the field.
Document Number - Optional field containing a maximum of 16 alphanumeric characters used for additional tracking efficiency.
Access Level - Numeric field containing a value between "0" and "9".
The access level is used to prevent unauthorized users from modifying or viewing documents with access restriction. "9" is the most restrictive access. When editing the field, the user can only assign a value less than or equal to the file's level. If the access level of a user is less than the file access level, the user is not allowed to edit or consult it. See the *Authorized User* 40 module for more information on access rights.
Description - Alphanumeric field containing a maximum of 64 characters. This field contains the description of the document.
File Type - Read only field that contains the document's extension or file type. Here are some examples of file types : doc, jpg, gif, txt, csv, xls, etc. This field is not valid when adding a folder.
Author - Alphanumeric field containing a maximum of 30 characters. This field contains the author of the document.

Field 1, Field 2, Field 3 - Optional alphanumeric fields containing a maximum of 20 characters each. These fields are for internal use and can be renamed in the *Dictionary* 47 module to fit the organization's needs.
Creation Date - Read only field that contains the document's creation date.

6 Select the type of document to attach (file or folder). Click on the **Browse** button to select a file or folder. Enter the remaining information and modify the information that appears by default if necessary.
7 Once all the information has been entered and modified, press **OK**. The document will automatically be associated to the file .

Note: An electronic document can also be associated to a physical file, but it is normally recommended to associate it with an electronic file.

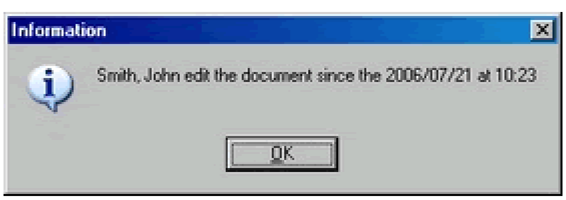
6.2.26.3 Viewing or Modifying a document's information

Viewing the information of a document

1 Click on **Inventory**->**File** from the *Main window*.
2 Find the wanted file 95 and keep it on the screen
3 Right click in the space reserved for electronic documents. A menu appears.
4 Select *View Document Information* in the menu.
5 A window appears with the document's information.

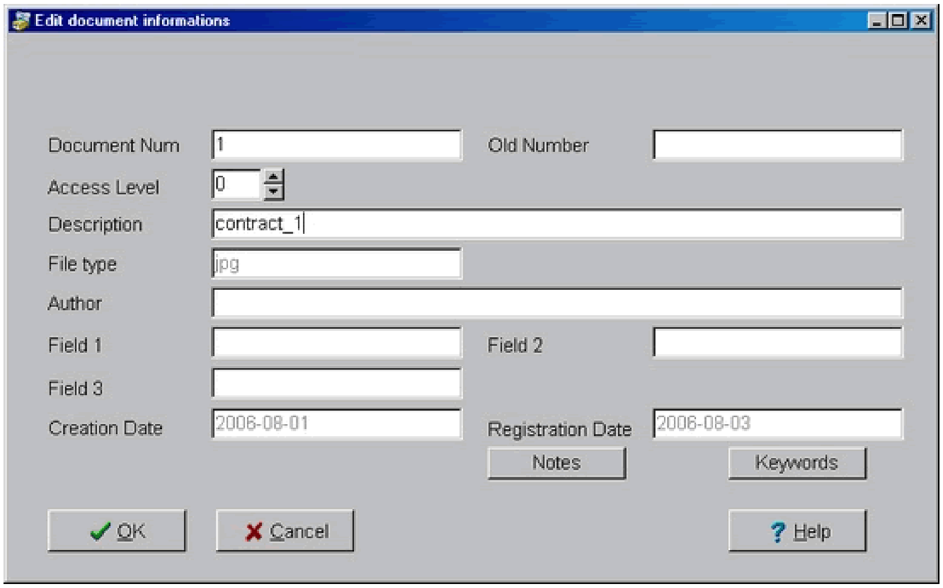
Viewing the user of a document

1 Click on **Inventory**->**File** from the *Main window*.
2 Find the wanted file 95 and keep it on the screen
3 Right click in the space reserved for electronic documents. A menu appears.
4 Select *Check Who Is Modifying The Document* in the menu.
5 A window appears with the information.



Modifying the information of a document

1 Click on **Inventory**->**File** from the *Main window*.
2 Find the wanted file 95 and keep it on the screen
3 Right click in the space reserved for electronic documents. A menu appears.
4 Select *Edit Document Information* in the menu.
5 A window appears with the document's information.



Old number - Read only field that contains the previous document number.
Registration Date - Read only field that contains the date at which the document was added to EDC.
Notes - Pop up window that enables one to add notes to the document. Notes are indexed, therefore the document can be found easily through the Full Text Search 131.
Keywords - Pop up window that enables one to add keywords to the document. Keywords are indexed, therefore the document can be found easily through the Full Text Search 131.

*For more information on the other fields, consult step **5** of the topic called Adding a document 108.

6.2.26.4 Consulting a Document

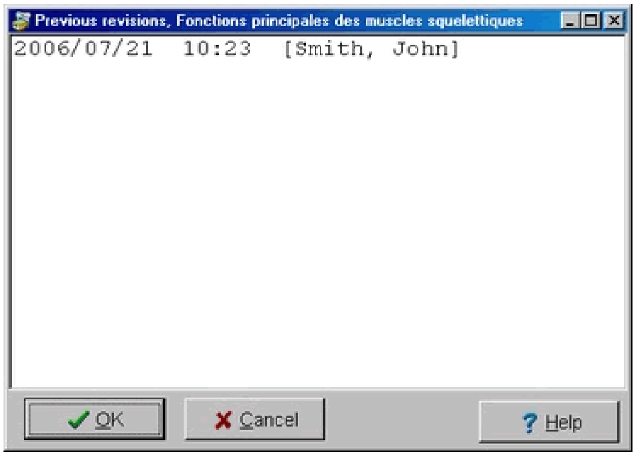
Consulting the last version of a document

1 Click on **Inventory**->**File** from the *Main window*.
2 Find the wanted file and keep it on the screen
3 Right click in the space reserved for electronic documents. A menu appears.
4 Select *Open Read Only -> Latest version / Last version with EDCView* in the menu.
5 The latest version of the document will be opened.

Note : EDCView must be configured in order for the menu item to be available. See the related Configuring EDCView 112 topic.

Consulting a previous of a document

1 Click on **Inventory**->**File** from the *Main window*.
2 Find the wanted file and keep it on the screen
3 Right click in the space reserved for electronic documents. A menu appears.
4 Select *Open Read Only -> Previous version / Previous version with EDCView* in the menu. A window appears.



5 Select the wanted version and press **OK**. The selected document version will be opened.

Note : EDCView must be configured in order for the menu item to be available. See the related Configuring EDCView 112 topic.

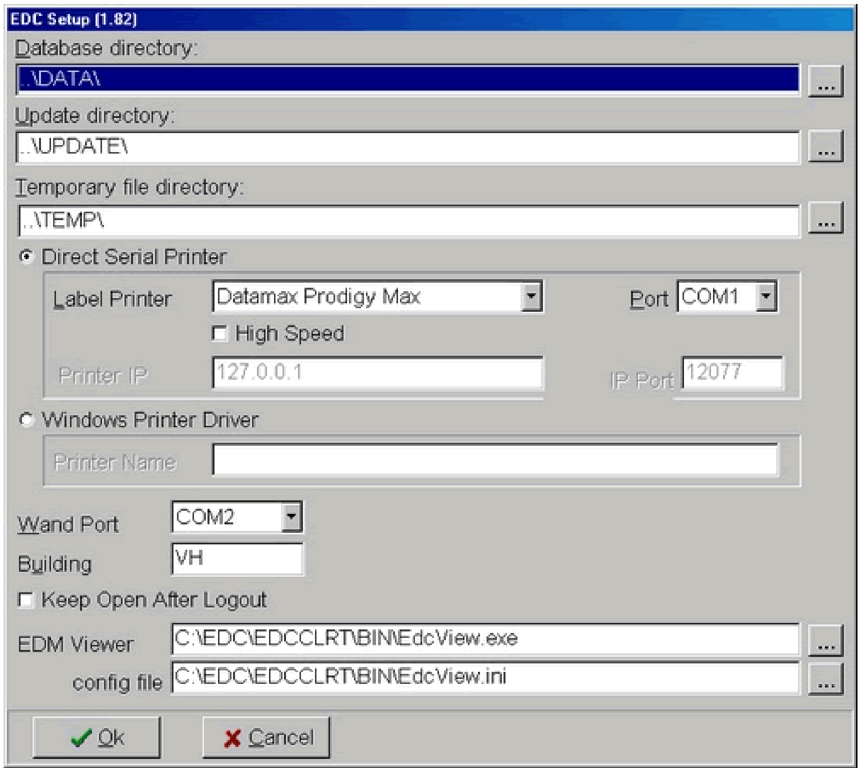
6.2.26.4.1 Configuring EDCView

EDCView is an all-around viewer that enables the user to open files for which the original software might not be installed on the computer. This viewer can be configured to recognize automatically certain file types or to open certain files with a specific program.

The configuration of this program should be handled by IT personnel or by qualified personnel with supervisor rights on the computer, server or network.

How to configure EDCView

1 Access the DC.CFG file by running the program called DC.SETP32.EXE. This file is situated in the BIN directory of EDC. A window appears.



2 Click on the browse button at the right of the **EDM Viewer** field. Select the wanted executable file (this file type always ends with .exe) and press **OK**. In the case of the example above, EDCView.exe was selected.
3 Click on the browse button at the right of the **Config file** field. Select the wanted configuration file (this file type always ends with .ini) and press **OK**. In the case of the example above, EDCView.ini was selected.
4 Press **OK** when all the files have been selected.

Note: Other third party viewers can also be used to view different file types within EDM. They must be configured along the same lines; the executable must be specified along with the configuration file. The set up of the configuration file might be different from one viewer to another. It is still recommended to use the EDCViewer provided by DocuData.

How to set up the configuration file

1 Find and open the configuration file you specified while in the DC.CFG.
2 If the file has never been opened, the following information should be included :

[General]

; library path is optional. If value is, default, library path will be
; created in the same folder where the viewer executable is found
LibraryPath=default

; indicates if the viewer should register all the formats it supports
; that are currently not registered
; 1 = yes, 0 = no

RegisterAllFormatsNotAssociated=0

; in this section overrides can be specified for different file format.
; for each file format, there are two options: to use the default
; registered application, or to use a specific application
; for example, to use the default pdf viewer, use pdf=default
; to use a specific EXE, use pdf=c:\pdfview\viewpdf.exe
[Overrides]
;pdf=default

; formats to be registered with the viewer. This may not always work as some
; native applications may have precedence
[Register]
Extensions=

; formats to unregister from the viewer. This is VERY DANGEROUS, and native
; applications will lose their associations
[Unregister]
Extensions=

All the information preceded by semi-colons (;) are comments and explanations. Here is additional information concerning the configuration file:

General

Library path : The library is used by the software to put temporary files or installation files (when an application is installed by the viewer, such as Microsoft Office Word Viewer).
By default it will be set as the folder in which the viewer executable was found. A path should look like the following : C:\EDC\EDCCLRT\Library

Register All Formats Not Associated: If '1' is entered, the EDCView application will appear in the ***Open with*** list of programs in Windows Explorer.

Overrides : An override is used to associate a file format with a specific application. This application will then open the file automatically instead of the default application. For example, one would want to open the GIF image format with paintbrush instead of the default viewer :

[Overrides]
gif=C:\WINDOWS\system32\mspaint.exe

Register : This is to specify the type of file formats that should be registered with the viewer. In other words, this file type will be opened by EDCView if no other default application opens it. Here is an example of a list of extensions to be registered :

[Register]
Extensions= pdf, doc, txt, gif, tif, jpg

Unregister : This is an advanced option used to specify the type of file formats that should be unregistered from the viewer. This is ***very dangerous*** and should only be done when really needed, since the original applications will loose their association to this file format. Take note that this does not always work with certain file types. Here is an example of a list of extensions to be unregistered :

[Unregister]
Extensions= dat, sav

6.2.26.5 Modifying a Document

1 Click on **Inventory**->**File** from the *Main window*.
2 Find the wanted file 95 and keep it on the screen
3 Right click in the space reserved for electronic documents. A menu appears.
4 Select *Open for Modifications* in the menu.
5 The latest version of the document will be opened for editing.
6 Perform the desired changes and save the document (in the third party software.)
7 To save modifications in EDC, right click in the space reserved for electronic documents and select *Save Modifications* in the menu.

or

To make sure the changes you made are not registered in EDC, right click in the space reserved for electronic documents and select *Cancel Modifications* in the menu.

6.2.26.6 Finalizing a Document

Finalizing a document means that it can no longer be modified. This option is mostly useful for documents that one does not wish to be able to modify, such as a final contract.

1 Click on **Inventory**->**File** from the *Main window*.
2 Find the wanted file 95 and keep it on the screen
3 Right click in the space reserved for electronic documents. A menu appears.
4 Select *Finalize* in the menu.
5 A confirmation message appears. Press *Yes* to continue and *No* or *Cancel* to abort the operation.

WARNING : The document can no longer be modified by any user from the moment on.

6.2.26.7 Deleting a document

1 Click on **Inventory**->**File** from the *Main window*.
2 Find the wanted file 95 and keep it on the screen
3 Right click in the space reserved for electronic documents. A menu appears.
4 Select *Delete* in the menu.
5 A confirmation message appears. Press *Yes* to continue and *No* or *Cancel* to abort the operation. The document will therefore be deleted.

6.2.27 Imaging Documents

6.2.27.1 Overview (Imaging)

For practical reasons the *Imaging* module is only accessible from the *File* module instead of the *Main window*. This is due to the fact that a document is directly scanned in a file.

The imaging module allows to scan documents contained in files and to manage images easily. Documents can be scanned directly into EDC, while images scanned off-site can be downloaded, printed or sent by email | fax to any recipient. Furthermore, this module allows the recognition of characters, the indexing, as well as the importation | exportation of images.

Take note that the Imaging module can only be used if the version of EDC Client is SAI or SAE.

Tasks

- Opening the Imaging module 116
- Scanning documents 117
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- Saving images 118
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- Performing OCR and indexing 120
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- Copying or pasting images 124
- Editing a scanned image 124
- Viewing an image 125
- Viewing or editing the keywords of an image 127
- Viewing the information of an image 127
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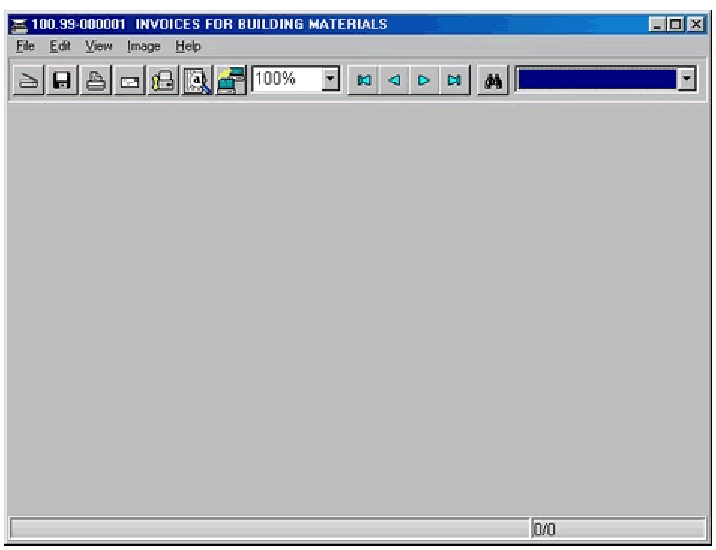
Module's window



6.2.27.2 Opening the Imaging module

As mentioned, imaging is closely connected with files. That is why the *Imaging* module is opened from the *File* module.

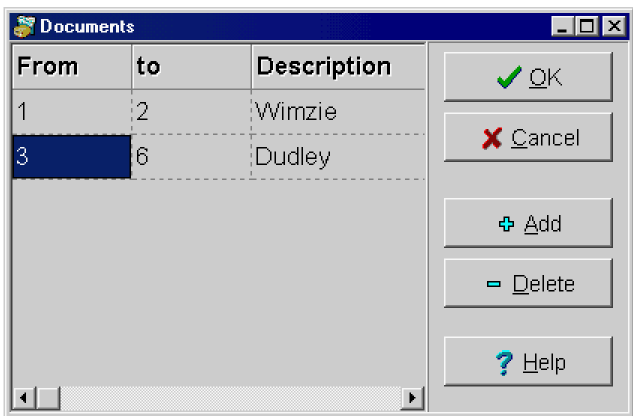
1. Click on **Inventory**->**File** from the *Main window*.
2. Make a search to find in which file the document has to be scanned or add a new file (see "Finding a box or a file 95" and "Adding an active box or an active file to the inventory 91").
3. Click on **File**->**Images** or on the **Images** icon to the right of the *Number* field. The *Imaging* module's window is displayed on the screen.

Note : The **Images** icon is only present when documents have already been scanned in the file. Take note that the image server must be running in order for the *Imaging* module to be opened. For all subsequent imaging rubrics, we will assume that the *Imaging* module is opened.

6.2.27.3 Scanning and editing documents

When scanning multiple documents under the same file, it might become complicated to retrace which page number corresponds to each document, thus the importance of specifying the page interval of each document. This section explains how to scan these documents and how to set these intervals.

1 Click on **File**->**Scan** from the *Imaging* module. A window appears, different for each scanner engine, that allows to set its parameters
2 Perform the scanning in accordance with the current scanner.
3 Click on **Edit**->**Documents** to register and identify documents scanned in the file.
4 A window opens and allows to enter a description for each scanned image or each group of scanned images.



5 Enter a description for the documents in the *Description* field or modify the existing description by simply clicking on it.

Note : The interval of images can be modified in the *From* and *to* fields of the corresponding line. This action is useful when a document has many pages that can be grouped together under the same description (a contract, for example, and its annexes).

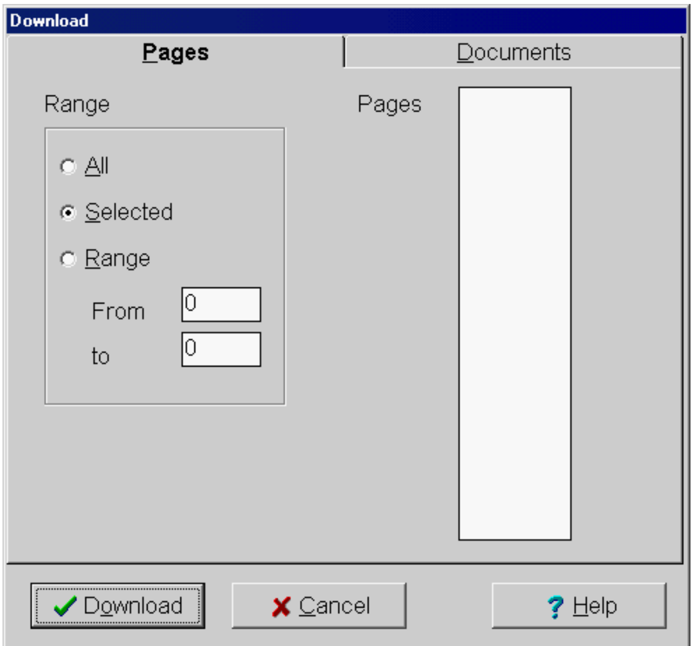
6 Click on the **Add** button to register other documents and enter their description or select a document (it will appear highlighted) and click on the **Delete** button to retrieve it from the registration.
7 Click on the **Accept** button to confirm documents' registration.

6.2.27.4 Downloading scanned images

The downloading is performed when archives are locally stored (see "Fields" in the *System Information* module).

Only images scanned last are locally stored for a determined period of time. More precisely, these images are locally stored up to the cache size 229 ,for the minimum period in cache 229. When this minimal time is passed and when the quantity of called back images or scanned images exceeds the cache size, previous images are replaced by new ones. Then old images will have to be downloaded (called back from the off-site record center) to be consulted and charges will be applied (similar to box or file retrievals.)

1 Click on **File**->**Download Images** from the *Imaging* module. A window appears.



2 Select all the images of a specific range and click on the **Download** button. Documents (images's group) instead of pages can be downloaded by selecting the *Documents* tab in the window above. The request is automatically transmitted to the off-site record center and images are displayed on the screen. These images will be available in the file up to the cache size and for the minimum period in cache.

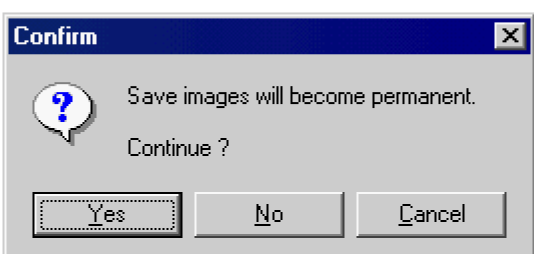
Note : The ***EDC* Replicator** program must be opened before processing.

6.2.27.5 Saving scanned images

The images become permanent when they are saved, that is why all changes must be done before (see "Modifying images 124").

If the image saving is not done by performing the following steps, the system will ask for it when exiting the *Imaging* module.

1 Click on **File**->**Save** from the *Imaging* module. A dialog box appears.



2 Click on the **Yes** button to confirm the action.

6.2.27.6 Printing scanned images

Locally archived images or called back images can be printed (see "Downloading images 117").

1. Click on **File**->**Print** from the *Imaging* module.
2. Enter an interval of pages to be printed in the window that is displayed and click on the **Accept** button.
3. The images will be automatically printed from the default printer.

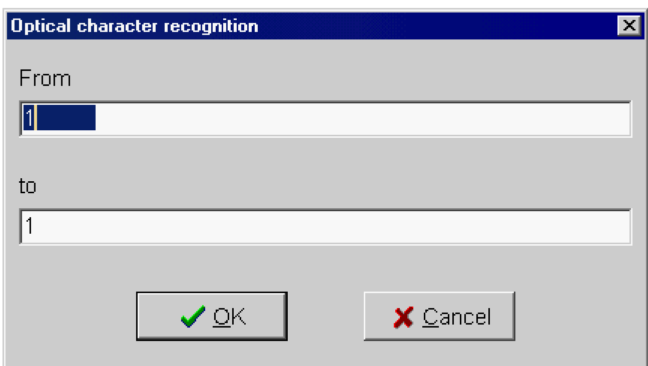
Note : Printing parameters can be modified by clicking on **File**->**Print Setup** from the *Imaging* module.

6.2.27.7 Performing Optical Character Recognition (OCR)

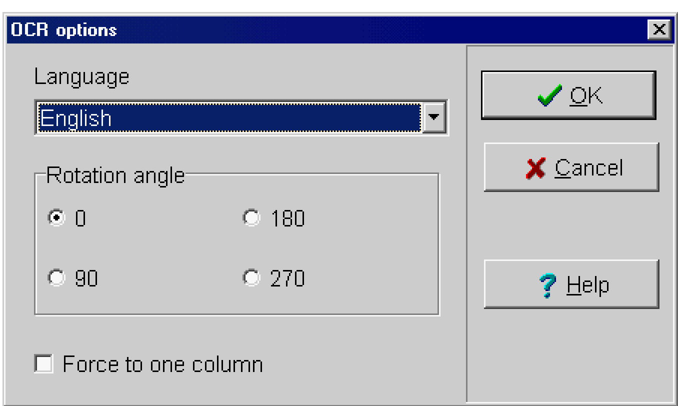
The Optical Character Recognition (OCR) allows to convert elements of a scanned image into elements of a text file. An image, or more exactly its textual content, can be read as any word processing file.

Take note that OCR works better when the image is black and white. We recommend 240 to 300 DPI for better results. DPI stands for Dots Per Inch/Pixels Per Inch; the resolution of an image or how many pixels are defined in the boundary of a square inch. The image resolution can be viewed in the image information 127. The image resolution is usually defined by the scanner used.

1. Click on **File**->**OCR** from the *Imaging* module. A window appears.

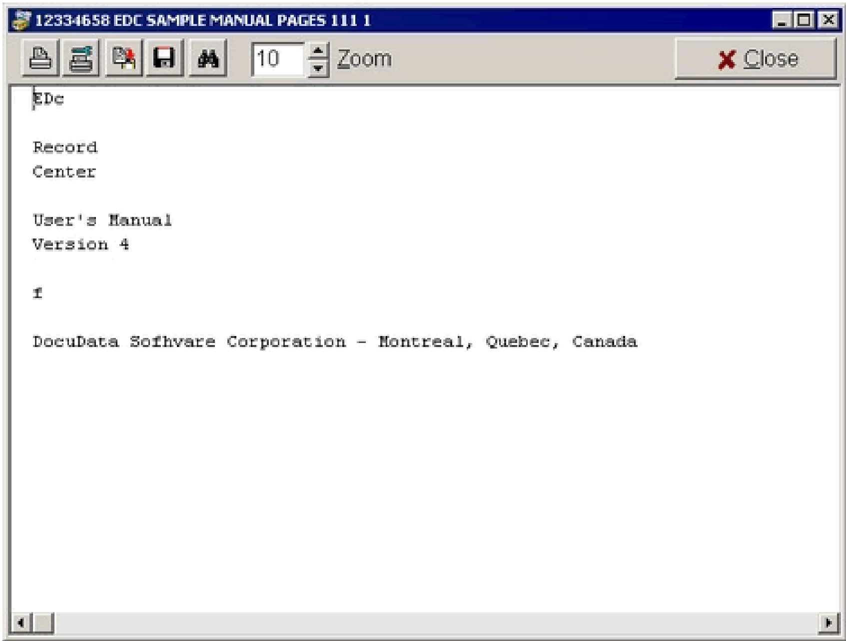


2. Enter a range of scanned pages to which the OCR applies and click on the **Accept** button. A window is displayed.



3. Select a language for the recognition and a rotation angle for the images, if necessary (when

images are not scanned in a position that allows a direct reading on the screen, they must be reoriented). The images are automatically converted in a text file.



This text can be completely or partially selected, printed or saved. Furthermore, a word or an expression can be searched inside the text by clicking on the appropriate button of the report's window.

4 Click on the **Close** button of the report's window to go back to the *Imaging* module.

6.2.27.8 Performing OCR and indexing

As mentioned before, the Optical Character Recognition allows to convert an image into a text file.

Take note that OCR works better when the image is black and white. We recommend 240 to 300 DPI for better results. DPI stands for Dots Per Inch/Pixels Per Inch. The resolution of an image or how many pixels are defined in the boundary of a square inch. The image resolution can be viewed in the image information 127. The image resolution is usually defined by the scanner used.

Note : The image indexation can be done automatically for an OCR template. This option must be previously set (see "Fields 80" in the *Retention Schedule* module). If the template has been selected for indexation for the document type the images are scanned from, then these images will be automatically indexed when being saved.

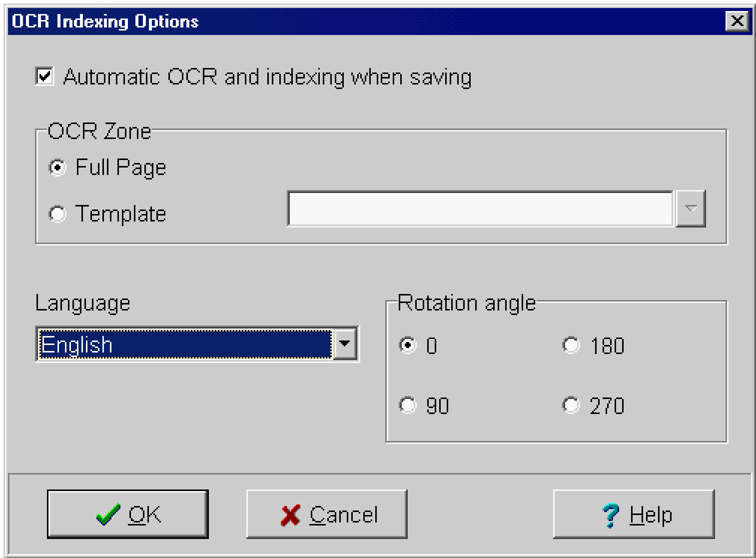
1 Click on **File**->**OCR and Index** from the *Imaging* module.
2 Enter an interval of scanned pages to which the recognition and the indexation apply, then click on the **Accept** button.
3 The recognition and the indexation are automatically performed by the system in accordance with the set parameters 120. When the processing is done, the system goes back to the module's window.

6.2.27.9 Editing OCR indexing options

Many OCR indexation options can be configured. For example, the indexation can be settled for the whole page or just part of it, (see "Defining or changing an OCR template 65"), a specific recognition language can be chosen, a text rotation angle can be specified and the automatic

OCR and indexing options when saving can be fixed.

1 Click on **File**->**OCR Indexing Options** from the *Imaging* module. A window appears.



2 Edit the desired parameters as following :
- Check-off the *Automatic OCR and indexing when saving* box if desired, to cancel the indexation on the current document.
- Specify if the indexation will be performed on the whole page or only for a specific zone (see "Defining or changing an OCR template 65").
- Specify the language that will be used for the indexation (normally the chosen language is the one displayed on the pages).
- Specify a rotation angle for the text. For example, check 90° or 270° if the scanned text is displayed on the left or the right side of the screen.

3 Click on the **Accept** button.

6.2.27.10 Indexing documents

Document indexation allows to perform faster searches than the ones performed on images. When scanned images are registered in the system, a description is entered for each document and reflects its main content (see "Scanning documents 117"). These documents (their description) can then be indexed.

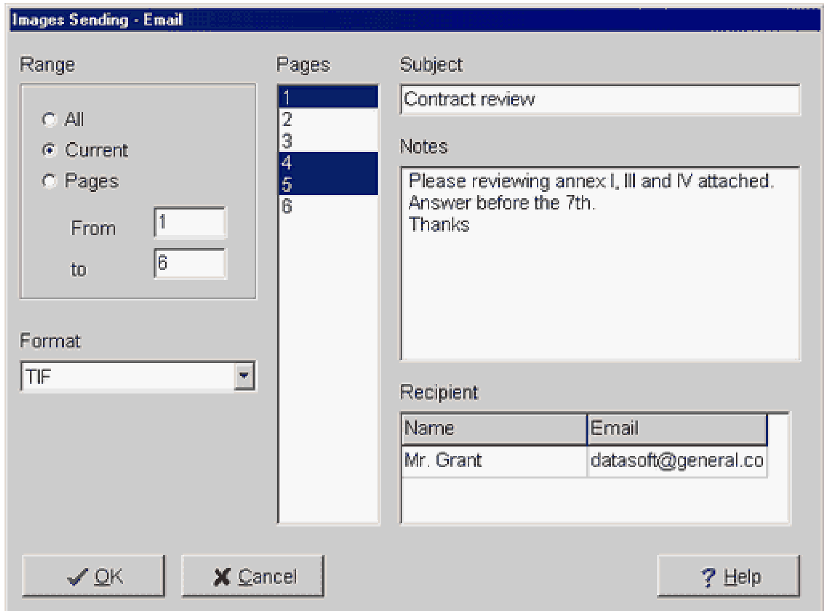
1 Find the wanted document by selecting it from the drop-down list at the right of the window.
2 Click on **File**->**Index Documents** from the *Imaging* module.
3 The indexation is automatically performed by the system in the current file for the selected documents. The keywords are added only to the first image of the document.

Note : When performing a Full text search 133 to find an indexed document, the result will indicate in which file the images have been scanned as well as the state of the file. If one presses on the **Open module** button, only the first image of the document will appear, along with its information.

6.2.27.11 Sending images by Email

For many reasons, a customer can ask to receive the images by email instead of waiting for their replication. This can be performed with the current operation.

1 Click on **File**->**Email** from the *Imaging* module. A window appears.



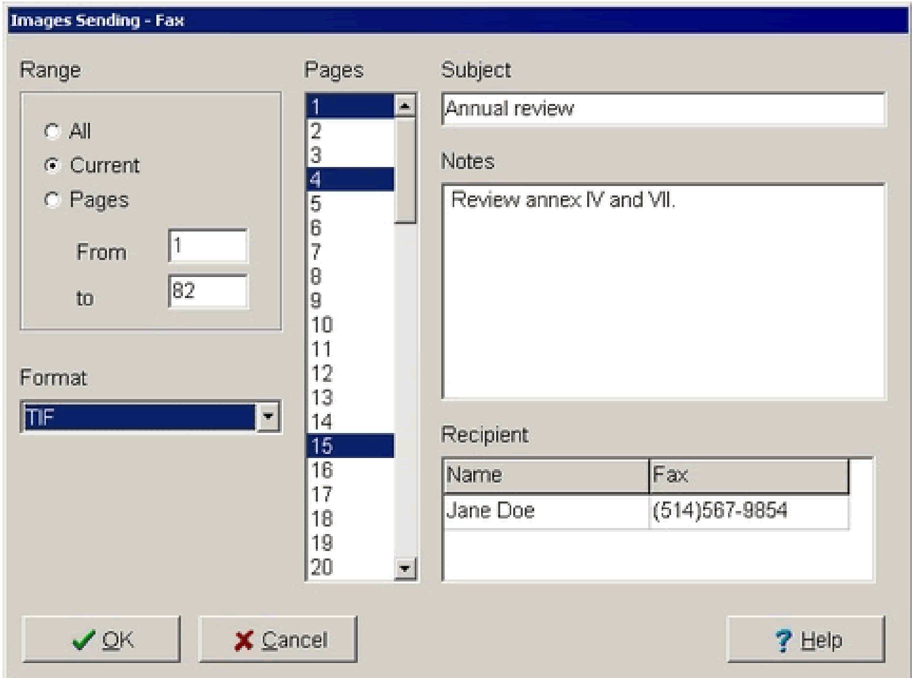
2 Select the images that must be sent via the **Range** options (more than one image can be selected when choosing the *Current* option, one simply has to press on the **Ctrl** button while selecting images). Enter a subject and notes if so desired, then enter a recipient and an email address in the appropriate fields. Choose a file format (TIF, PNG or PDF) and press **OK** to send images.

Note : The SMTP address of the record center must be set before in the *System Information* module.

6.2.27.12 Sending images by fax

The images that are locally stored or called back from the off-site record center (see "Downloading images 117") can also be sent by Fax.

1 Click on **File**->**Fax** from the *Imaging* module. A window appears.



Note : The window normally opens without any indication.

2 Select the images that must be sent via the **Range** options (more than one image can be selected when choosing the *Current* option, one simply has to press on the **Ctrl** button while selecting images). Enter a subject and notes if so desired, then enter a recipient and a fax number in the appropriate fields. Choose a file format (TIF, PNG or PDF) and press **OK** to send images.
3 Select the device from which the images will be sent in the window that is displayed and click on the **OK** button.
4 The images are automatically sent to the specified recipient. A dialog box appears, indicating that the transmission has been completed (or in some cases failed). Press **OK** to terminate the action.

6.2.27.13 Importing an image

The images that are imported must be supported by the following formats : bmp, png, eps, afi, vst, tga, dcx, pcc, pcx, jpeg, jpg, tif and tiff.

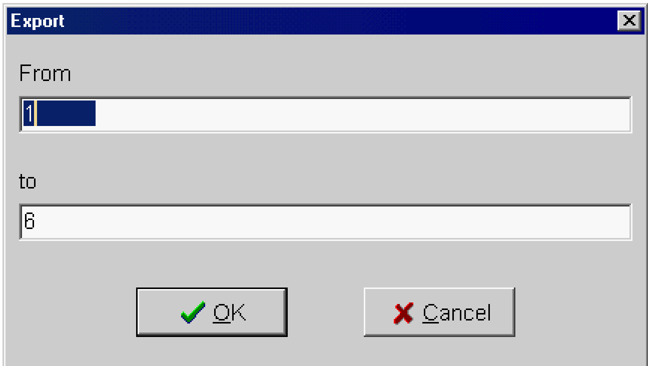
1 Click on **File**->**Import** from the *Imaging* module. A window appears, different for each computer.
2 Search for the folder in which the image is located, select the image and click on the **Open** button
3 The image will be automatically imported to the current inventoried file and will be displayed on the screen.
4 Repeat steps **1** to **3** if necessary.

Note: It is possible to import many images at a time via the importation in the *Box and File Maintenance* module, consult the Importing Images 192 topic.

6.2.27.14 Exporting images

The images that are locally stored or called back from the off-site record center (see "Downloading images 117") can be exported.

1 Click on **File**->**Export** from the *Imaging* module. A window appears.



2 Enter an interval of images to export and click on the **Accept** button. A window is displayed, different for each computer.
3 Select the directory to which the images will be exported, enter a name for the file and click on the **Save** button. The exportation will be automatically performed and the system will come back to the *Imaging* module's window.

6.2.27.15 Copying or pasting images

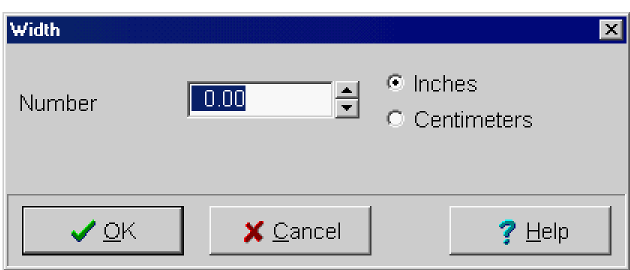
This option gives the possibility to copy an image and paste it to the current file or to copy a scanned image from the current file and paste it somewhere else.

Copy a scanned image from the current file

1 Keep the wanted image on the screen and click on **Edit**->**Copy Image**.
2 Exit ***EDC*** and paste the related image in any wanted location.

Paste a new image in the current file

1 Capture or copy an image.
2 Open the *File* module, find the wanted file and open the *Imaging* module.
3 Click on **Edit**->**Paste New Image**. A window appears.



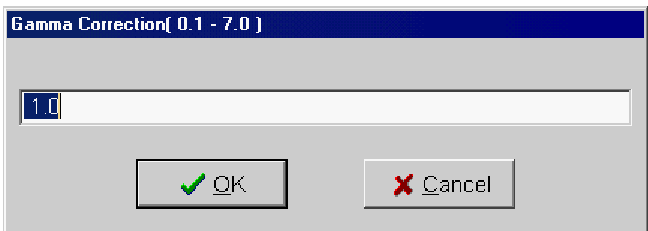
4 Enter a width for the new image (either inches or centimeters) and press **OK**. The new image is automatically added to the current file. Do not forget to save this image when exiting the *Imaging* module.

6.2.27.16 Editing a scanned image

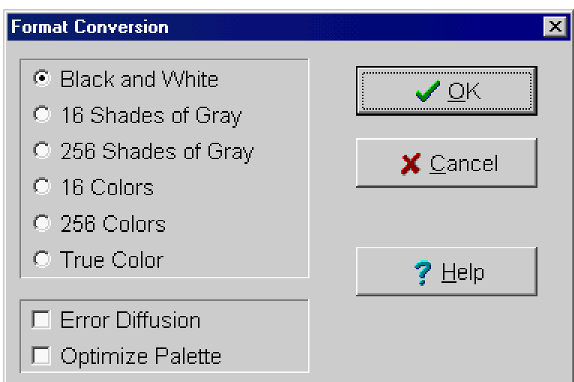
When documents have just been scanned but are not saved, the images can be modified. For example, when a document is scanned recto-verso, the header of the verso image is upside down. Then it is necessary to rotate this image with a 180° angle. As soon as it is saved, the

content of a scanned image cannot be modified anymore. It will be displayed, printed and exported as it was modified and not as the original scanned content.

1 Click on **Image** from the *Imaging* module.
2 Select one of the following items from the **Image** menu :
- **Rotate**->**90°|180°|270°|Arbitrary**.
- **Mirror**->**Horizontal|Vertical**.
- **Negative**.
- **Scale to gray**.
- **Sharpen**.
- **Smooth**.
- **Contrast**->**Increase|Decrease**.
- **Brightness**->**Increase|Decrease**.
- **Gamma Correction**. A window appears and allows to specify the degree of correction.



- **Format Conversion**. A window appears and allows to select a format.



- **Deskew**
- **Despeckle**
- **Border Clean Up**

3 A window is displayed after choosing and specifying a type of modification. Enter the interval of pages for which the changes will be applied and click on the **Accept** button.

6.2.27.17 Viewing an image

Many options are offered when viewing an image; one can smooth a black and white image as well as adjust the size of the image viewed.

Smoothing out a black and white image

1 Click on **Image** from the *Imaging* module.
2 Click on **View -> Antialiasing**

3 The image will automatically be smoothed out.

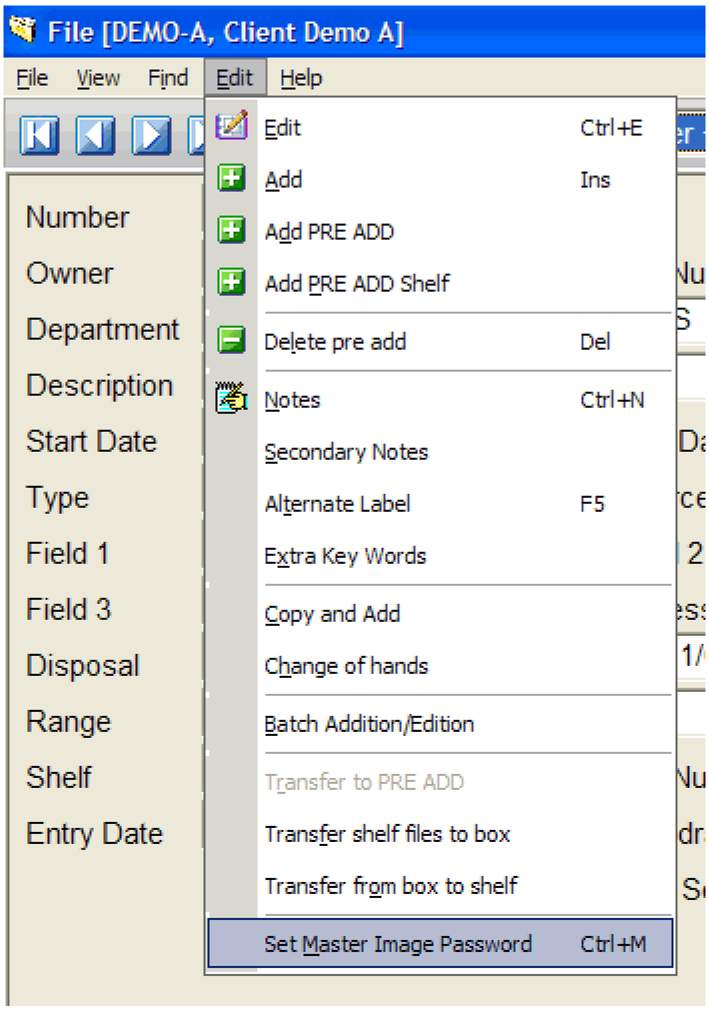
Note: Only images in black and white in the bmp format can be smoothed out.

Changing the size of the image

1 Click on **Image** from the *Imaging* module.
2 Click on **View -> Actual Size | Fit width | Fit height | Full page**
3 The image will automatically be sized properly.

6.2.27.18 Password Protecting an image for the web

You can assign a password for the images viewed on the web. You access this from the File module like so:



The password is on the file level. So you can enter a new password for each file in the File module. So if you have 100 images in a file then all 100 images will use the same password.

6.2.27.19 Viewing or editing the keywords of an image

Viewing the keywords of an image

1 Click on **Image** from the *Imaging* module.
2 Click on **View -> Keywords**. A window appears containing the different keywords related to the image.
3 When you are finished, click on the **Cancel** button.

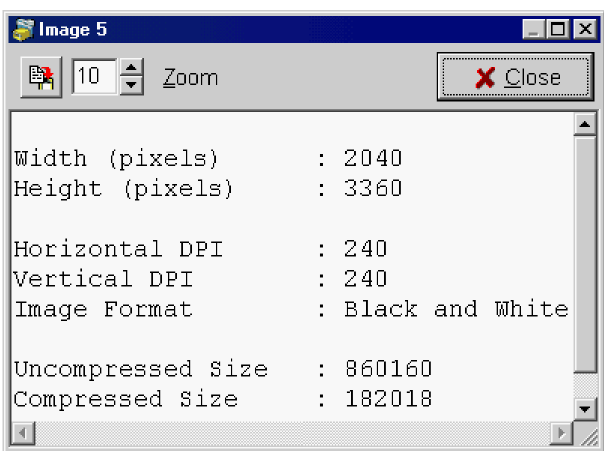
Editing or adding keywords to an image

1 Click on **Image** from the *Imaging* module.
2 Click on **Edit -> Keywords**. A window appears.
3 Select the image for which you want to add or edit the keywords.
4 Enter the wanted modifications for that image and press **OK**.
5 Repeat steps **1** to **4** for all the desired images.

6.2.27.20 Viewing the informations of a scanned image

The information related to the images displayed on the screen can be viewed.

1 Click on **View**->**Image Information** from the *Imaging* module.
2 A window appears, giving information about the current image.

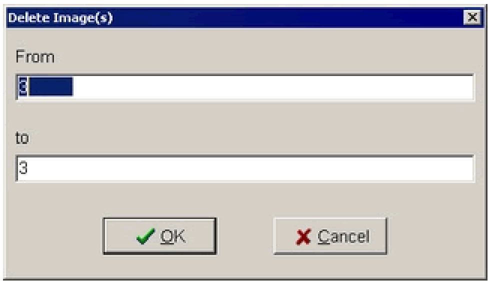


3 Click on the **Close** button to terminate the action.

6.2.27.21 Deleting images

When documents have just been scanned but are not saved, the images can be deleted. Yet, as soon as the images are saved it becomes impossible to delete them.

1 Click on **Image** from the *Imaging* module.
2 Click on **Edit -> Delete image(s)**. A window appears.



3 Enter a deletion range and press **OK**.
4 The image(s) will be deleted.

6.3 Search

6.3.1 Overview (Search)

This module allows to find boxes and files according to certain criteria; it also allows to show or print the found results. Furthermore, this module is used to produce custom reports about boxes and files.

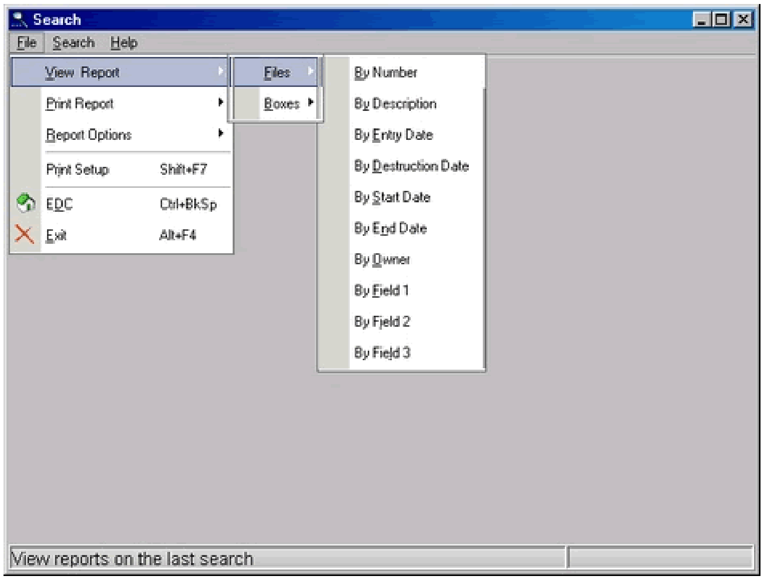
Available reports

- list of boxes found with search criteria (sorted by number, description, entry date, destruction date, start date, end date, old number, owner, source location, field 1, field 2 or field 3)
- list of files found with search criteria (sorted by number, description, entry date, destruction date, start date, end date, owner, source location, field 1, field 2 or field 3)

Tasks

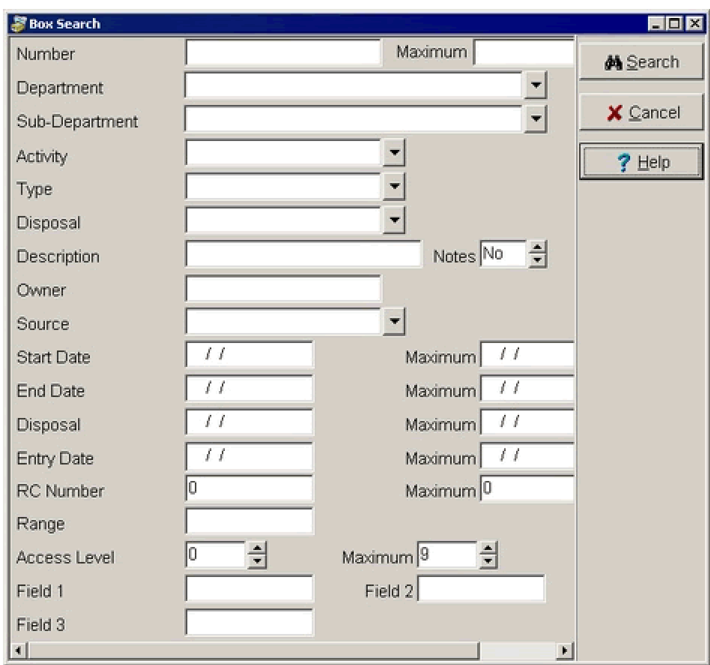
- Searching for boxes or files 129
- Adding or removing boxes or files from search results 130
- Viewing or printing search results 131

Module's window

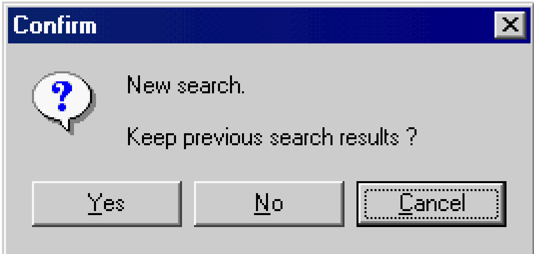


6.3.2 Searching for boxes or files

1. Click on **Inventory**->**Search** from the *Main window*.
2. Click on **Search**->**Box Search|File Search**. A window is displayed, allowing to specify some search criteria.



3. Fill in the appropriate fields and click on the **Search** button. The search results will include the records that possess all the entered elements.
4. The search results are displayed in a new window. To view the details, the history or the notes of a record, select the desired record (it will appear highlighted) and click on the **View** button. Click on the **Close** button to go back to the module's window.
5. A dialog box is displayed.



6 Perform one of the following actions :

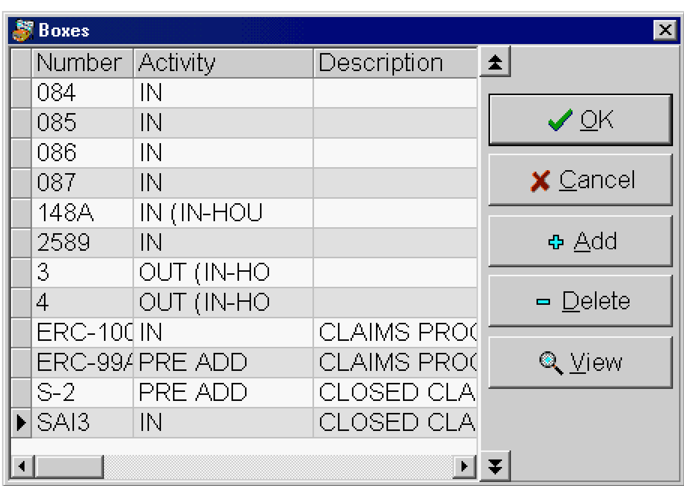
- Click on the **Yes** button to start a new search keeping the previous search criteria.
- Click on the **No** button to start a new search canceling previous search criteria.
- Click on the **Cancel** button to go back to the module's window and to access the detailed search report.

Note : A search operation will find all boxes or files containing the specified search criteria. When entering several filters simultaneously, the search result will include only the records containing all the filters.
In the case of *Notes* (if its value is set to "yes") and *Description* fields, any character string to look for can be entered. The module will explore all of the contents of those fields and return those containing the specified character string. For example, searching for "Mont" in the *Description* field, will give a search result that include all boxes or files containing "Montreal", Montana", "Month" in that field.

6.3.3 Adding or removing boxes or files from search results

Boxes and files can be deleted or added to previous search results. Often, searches are performed to produce custom reports; that is why the software must allow the deletion of boxes or files from the final report, or the addition of boxes or files that did not fit the search criteria.

1 Perform a box or file search (see "Searching for boxes or files 129").
2 Click on **Search**->**Edit Box Search|Edit File Search**. A window appears, containing all the items found.



3 Perform one of the following operations :

- To add items, click on the **Add** button. For files, specify if they must be added by description; enter a number or description, select the desired items (they will appear

highlighted) and click on the **Accept** button.
- To delete items, select the desired items and click on the **Delete** button.

4 Click on the **Accept** button.

6.3.4 Viewing or printing search results

1 Perform a box or file search (see "Searching for boxes or files 129").
2 Click on **File**->**View Report|Print Report**->**Files|Boxes**.
3 Select one of the following sort criteria from the menu:

- **By Number**
- **By Description**
- **By Entry Date**
- **By Destruction Date**
- **By Start Date**
- **By End Date**
- **By old box number** (only for boxes)
- **By Owner**
- **By Source Location** (only for boxes)
- **By Field 1**
- **By Field 2**
- **By Field 3**

4 The report will be printed or displayed soon after, accordingly with the sort criteria previously selected.

6.4 Full Text Search

6.4.1 Overview (Full Text Search)

This module allows to find boxes, files, electronic documents or scanned documents rapidly, by searching in all the recorded information. The search results can be printed.

Available reports

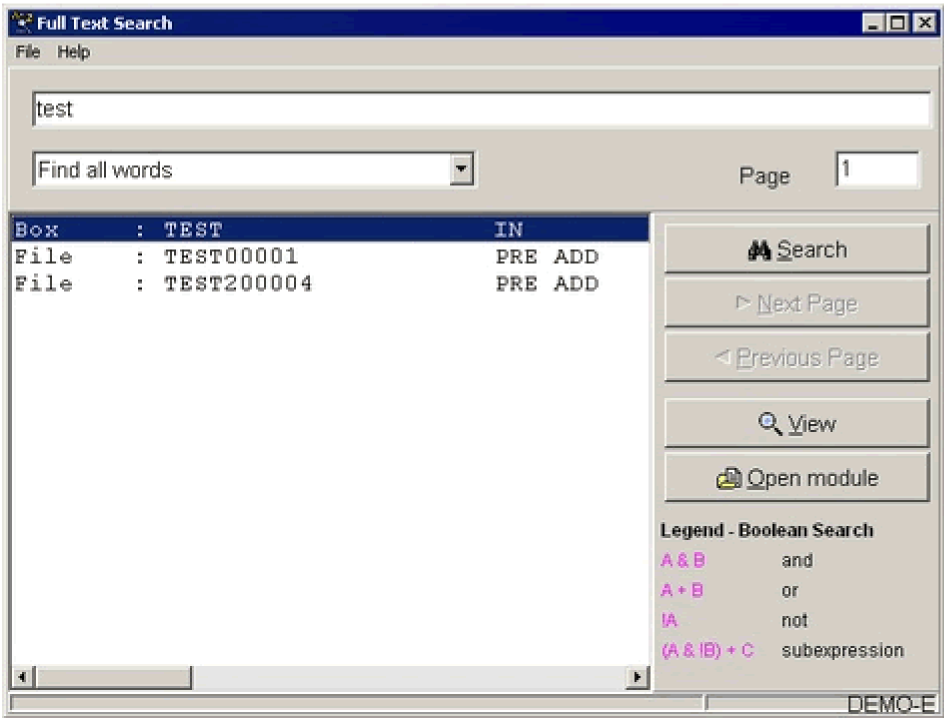
- list of boxes found
- list of files found
- list of images found
- list of documents found

Search options 132 (see the next section)

Tasks

- Searching for boxes, files and images 133
- Viewing or printing search results 134
- Setting up EDC for full text search 133
- Batch indexing boxes and files 134
- Manually adding keywords to boxes and files 135

Module's window



Note: Usually, this window does not contain information when opened.

6.4.2 Search options (Full Text Search)

"Searched text zone"
This zone allows to enter any information (letters, words, expressions, etc.) that needs to be searched.

Note : When typing a word in capital letters, the system will only find expressions containing capital letters, contrary to minuscule letters that will find expressions containing either one. For example, a search on "of" will find expressions containing "of", "OF", "Of" or "oF".

Note : Some characters are used to separate words or character strings. Here are examples that can explain how to use these separating characters : searching the expression "if/or" is considered as searching the words "if" and "or"; searching "1234.10" is like searching two character strings as "1234" and "10"; this is because "/" and "." are separating characters (see the list below 135).

Search type
Drop-down field that can contain "Find all words", "Find any of these words" or "Boolean expression"
This field allows to select a search mode.

Find all words
The documents found contain all the words entered for the search.

Note : Only the exact words are found (ex: when searching "sale", the system will not find the word "sales".)

Find any of these words
The documents found contain at least one of the words entered for the search.

Note : Only the exact words are found

Boolean expression
The documents found contain the result of the Boolean expression entered for the search. The Boolean expressions can take the following forms : MIKE & SALE. It is possible to combine Boolean operators by including the Boolean sub-expressions in brackets. The result of the expression in brackets will be determined before continuing the search with the next operator.

Example : the search (MIKE & SALE)& !PURCHASE will be resolved as follows :
1 First, the search will find all the documents containing MIKE and SALE.
2 Second, the search will find all the documents including results of step **1** but excluding the expression PURCHASE.

Boolean operators
* This symbol replaces many characters. It can be used at the beginning or at the end of a word. Searching "MIKE*" will find all the documents containing MIKE, MIKEY, etc.
& This symbol indicates that all the words joined together must be included in the documents searched. Searching "MIKE & SALE" will find only documents containing these two words.
+ This symbol indicates that at least one of the words joined together must be included in the documents searched. Searching "MIKE + SALE" will find all the documents containing MIKE and all the documents containing SALE.
! This symbol indicates that the word following it will be excluded from the search. Searching "MIKE & !SALE" will find all the documents containing MIKE but excluding SALE.

Page
Indicates the number of the current page from search results.

"Result zone"
Zone where search results are displayed. The results are displayed one page at a time to increase the speed of the search.

Note : See "Setting up EDC for full text search 133".

6.4.3 Searching for boxes, files and images

1 Click on **Inventory->Full Text Search** from the *Main window*.
2 Enter the words to find in the text search zone.
3 Select the desired search mode (see "Search options 132").
4 Click on the **Search** button. The search results are displayed.
5 Click on the **Next Page** or on the **Previous Page** to navigate within the results.
6 To view an item, select the item and click on the **View** button to consult its detailed information.
***7** To open a module from the *Full Text Search*, select a document from the list (it will appear highlighted) and press the **Open module** button.

6.4.4 Setting up EDC for full text search

The full text search is only performed for documents that have been indexed before. When documents are indexed, a list can be predefined in the *System Information* module to prevent the indexation of some words as "to", "from", "for", "the", etc. (see Editing noise words)

The indexing can also be performed by ***EDC*** on specific text zones that are predefined in the *Customer Information* module (see "Defining or changing an OCR template 65"). This function is useful for the auto-indexing of invoice numbers, for example, because they are generally located

in the same zone on images.

There are three ways to index documents :

- Auto-indexing documents when entering them in the system.
  In the *Retention Schedule* module, it is necessary to activate the **Auto index boxes**, **Auto index files** or **Auto index images** for the desired document types. The OCR template used by ***EDC*** to perform indexing can also be specified.

- Manual indexing one document at a time (when adding keywords to an item, the system will not index them automatically, so one needs to index the documents by batch right after making changes.)
  See "Manually adding keywords to boxes and files 135".

- Batch indexing several documents at the same time.
  See "Batch indexing for boxes and files 134".

6.4.5 Viewing or printing search results

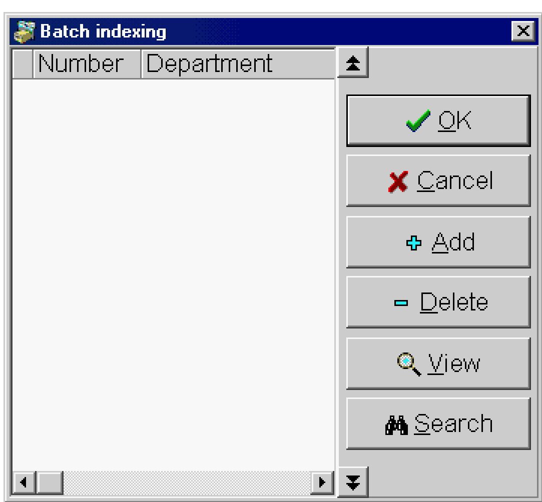
1 Perform a full text search (see "Searching for boxes, files and images 133").
2 Click on **File**->**Report Options**->**Box|File** and choose a predefined report or modify report fields if so desired.
3 Click on **File**->**View Report|Print Report**->**Files|Boxes|Images** to view or print the search results.

Note : Only the search results that have been viewed before are displayed in these reports. If the report is produced right after performing the search and without clicking on the **Next Page** button, only items included in the first page of result are displayed on the report.

6.4.6 Batch indexing boxes and files

This procedure is normally used for setting up the *Full Text Search* for boxes and files already inventoried in the system but not indexed.

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Click on **File**->**Batch indexing**. A window appears.



3 [Perform a search] 129 by clicking on the **Search** button or add documents to be indexed manually by clicking on the **Add** button.
4 To delete items from the list, select the desired item (it will appear highlighted) and press on the **Delete** button.
5 When the list is complete, click on the **Accept** button.

6.4.7 Viewing or adding keywords

Keywords are used to facilitate the *Full Text Search*. To activate the *Full Text Search* (and the keywords option) for a customer, see the [Setting up EDC for full text search] 133 topic.

Viewing keywords

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Search the desired item, click on **View**->**Keywords**. A window appears with the keywords of the box|file.

Adding keywords

1 Click on **Inventory**->**Box|File** from the *Main window*.
2 Search the desired item, click on **Edit**-> **Extra Keywords**. A window appears.
3 Enter the new keywords.
4 To terminate the operation and save the new keywords press **OK**. To cancel the operation and the new changes press **Cancel**.

6.4.8 List of separating characters

Here is a list of the characters used to separate words or character strings.

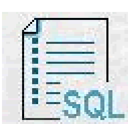
. , : ; ` ‘ ’ “ ” ¨ ~ · « » ( ) < >
[ ] { } ¦ | ? ¿ ! ¡ + ± ^ ¸ & @ *
® ¶ ¤ ° $ ¢ £ ¥ % ¾ ½ º ^{1} ^{2} ^{3} ª

Note : The space between two words is also considered as a separation.

6.5 Report (SQL)

6.5.1 Overview (SQL Reports)

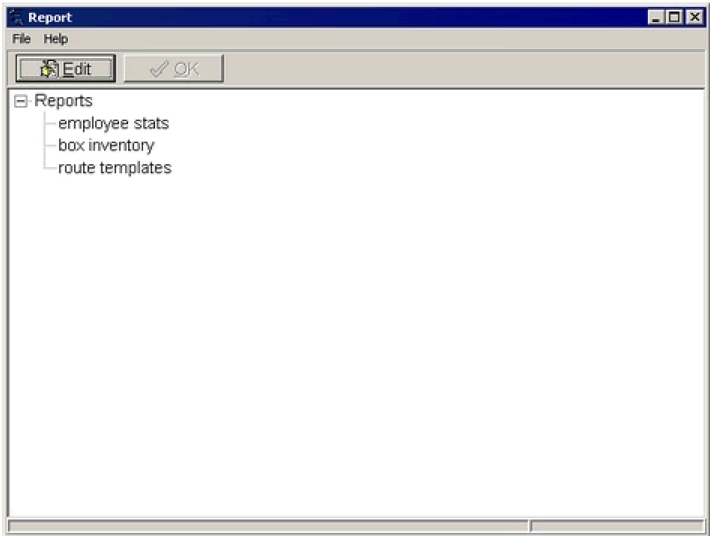
This module is mostly used to view reports and make small modifications to imported reports. For more advanced users it can also be used to create customized reports. A tutorial is available at ftp://docudatasoft.com/common/Learning_Report_Builder/



Tasks

- [Working with reports (adding, editing, importing, etc.)] 136
- [Customizing imported reports] 139
- [Working with the Design tab] 140
- [Working with the Data tab] 144

Module window



6.5.2 Working with reports

*Adding and Importing a report

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 To add a new report to a folder, select the folder (ex:Reports) and it will appear highlighted.
4 Right-click on it with your mouse and select *Add a child* from the menu.
5 A window appears. Enter the new report's name and press **OK**.
6 Double-click on your new report to open it.
7 Click on **File->Import**. A window appears (the window is different for each computer).
8 Select a report (it will appear highlighted) and press **Open**
9 Perform small changes (at least one)*
10 To save the report, click on **File->Close**
11 A message appears: "Save the changes".Press *Yes* to save the changes.
12 When all is done, press **OK**.

*If no changes are performed, the report cannot be saved.

Editing a report

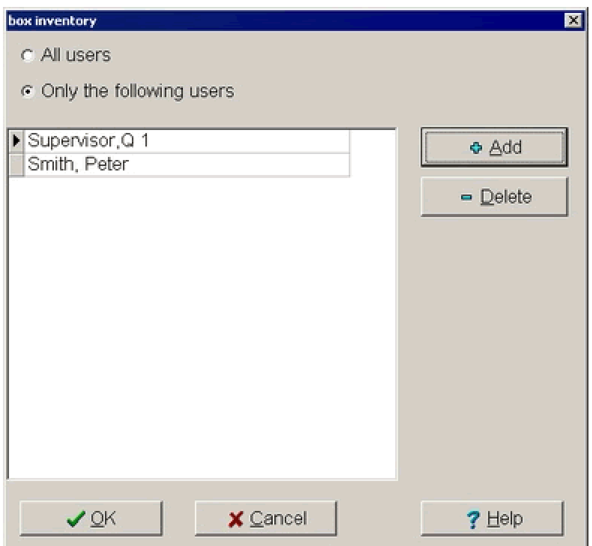
1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Perform the changes needed
5 To save the report, click on **File->Close**
6 A message appears: "Save the changes".Press *Yes* to save the changes.
7 When all is done, press **OK**.

Renaming a report

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Select the report (it will appear highlighted).
4 Right-click on it with your mouse and select *Rename* from the menu.
5 A window appears. Enter a new name for the report and press **OK**.
6 When all is done, press **OK**.

*Editing the access rights of a report

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Select the report (it will appear highlighted).
4 Right-click on it with your mouse and select *Access rights* from the menu.
5 A window appears.



5 To make this report available to all users, select the *All users* option.
6 To make this report available to a few users, select the *Only the following users* option.
7 To add users, click on the **Add** button. A list of users will appear. Select the desired users (they will appear highlighted) and press **OK**. They will automatically appear on the list.
8 To delete users, select the desired users from the list (they will appear highlighted) and press the **Delete** button.
9 When all the changes have been made, press **OK**.
10 When all is done, press **OK**.

Deleting a report

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Select the report (it will appear highlighted).
4 Right-click on it with your mouse and select *Delete* from the menu.
5 A message appears: " Permanently delete (report's name) and all its children ? Related information will be deleted."

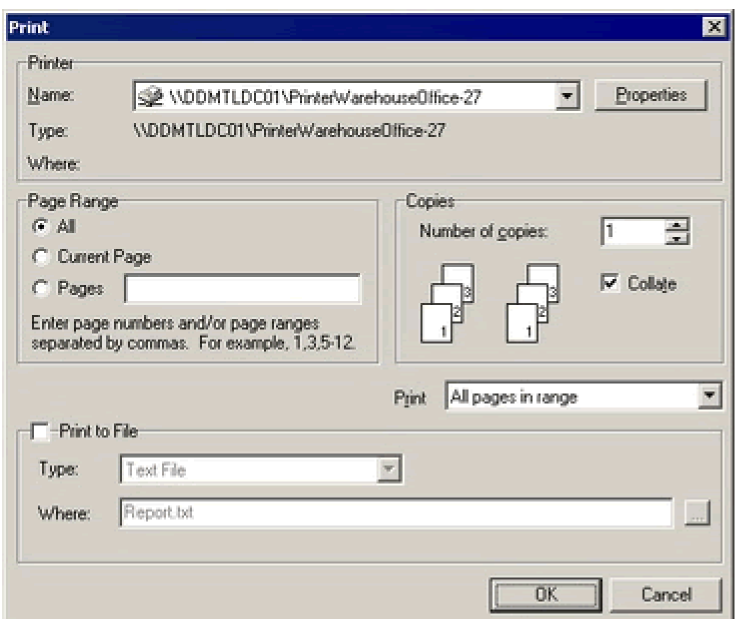
6 Press *Yes* to delete the report, *No* or *Cancel* to abort the operation.
7 When all is done, press **OK**.

Previewing a report

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Select the report (it will appear highlighted).
3 Right-click on it with your mouse and select *Report*.
4 To preview the report, click on the *Preview* tab.
5 Depending on the chosen report, some fields might be making references to the different activity codes (ex: the codes for the box activities or the delivery activities.) To understand all the different activity codes, see the Activity codes 228 chapter of the Appendix.

Printing a report

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Select the report (it will appear highlighted).
3 Right-click on it with your mouse and select *Report*.
4 Before printing a report it would be better to preview it (to preview the report, click on the *Preview* tab.)
5 If printing from the *Preview* tab, click on the **Print** icon . If printing from the *Design* or the *Data* tab, click on **File -> Print**. A window appears.



6 Select a printer, a page range, a number of copies. If the print to file option is checked off, select a file type in the drop-down list. Click on the **Browse** button to specify a file name and the repertory where it will be saved.
7 Press **OK**

For all subsequent report topics, assume that the *Report* module has already been opened and

that a new report has already been created.

6.5.3 Customizing an imported report

Specifying a customer

Using the Search Data icon

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Preview** tab.
5 Click on the **Search Data** icon 
6 Enter the CustNo 220 or the CustKey 220 in the appropriate field.
7 Press **OK**

Note: When the CustKey 220 is selected, the value entered is case sensitive.

In the Data tab

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Data** tab.
5 Select the master data view that includes the field called CustNo 220 or CustKey 220.
6 Click on the **Search** icon 
7 Enter a value in the value column beside the CustNo 220 or the CustKey 220 field.

Note: This option is only available if one has rights to edit a report. When the CustKey 220 is selected, the value entered is case sensitive.

Specifying a date range

Using the Search Data icon

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Preview** tab.
5 Click on the **Search Data** icon 
6 Enter the date in the appropriate fields.
7 Press **OK**

In the Data tab

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Data** tab.
5 Select the master data view that includes the field that specifies the word Date (ex:

DeliveryDate, HxDate, OrderDate, etc.)

6 Click on the **Search** icon
7 Enter the date in the value column beside the selected "date" field.

Note: When specifying a date range, one must be certain that the dates entered corresponds to the date mask specified in the System Information module.

6.5.4 Working with the Design tab

All the following operations are available when opening a report in the *Report* module. The design tab is the default tab that will automatically appear when a report is opened.

For beginner users :

These operations are mostly used when one wants to add a few things to a report that was previously imported.

Adding text

1 Click on Inventory->Report from the Main Window.
2 Click on the Edit button
3 Double-click on the report to open it.
4 Click on the Design tab.
5 Click on the Text icon and click on the location of your choice in the report.
6 To edit the text within the label, select the label and edit the text in the Set value field from the toolbar.

Adding a bar code

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on the **BarCode** icon and click on the location of your choice in the report.
6 To edit the text within the label, select the label and edit the text in the *Set value* field from the toolbar.

Adding a system variable

A component that allows you to display the page number, time, date, and other useful information.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.

4 Click on the **Design** tab.

5 Click on the **SystemVariable** icon and click on the location of your choice in the report.
6 To edit the variable, select the label and select a type in the *Variable Type* field from the toolbar.

Adding a memo

Prints multiple lines of plain text in a report

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.

5 Click on the **Memo** icon and click on the location of your choice in the report (normally it is in the detail section).
6 To edit the text within the label, select the label and edit the text in the *Set value* field from the toolbar.

Adding rich text

A component that allows you to print formatted text.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.

5 Click on the **RichText** icon and click on the location of your choice in the report.

Adding an image

Displays graphics such as bitmaps, GIFs, and JPEGs.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.

5 Click on the **Image** icon and click on the location of your choice in the report.

Adding a shape

Displays various shapes, such as squares, rectangles, circles, and ellipses. Use the *Shape Type* field to select the shape.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button

3 Double-click on the report to open it.
4 Click on the **Design** tab.

5 Click on the **Shape** icon  and click on the location of your choice in the report.

Adding a line

Displays a line. Use the *Line Types* field to set the line orientation.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.

5 Click on the **Line** icon  and click on the location of your choice in the report.

Adding a region

A region logically groups components together. This is normally used for layout purposes.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.

5 Click on the **Region** icon  and click on the location of your choice in the report (normally it is in the detail section).

<u>For advanced users:</u>

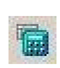
These operations are mostly used when creating a new report. This section is for people that have a very good comprehension of the concept of a database. These procedures imply linking fields from the design tab to fields from the data tab.

Adding DB items

DBCalculation

Performs simple database calculations (Sum, Min, Max, Average, Count).

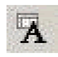
1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.

5 Click on the **DBcalculation** icon  and click on the location of your choice in the report (normally it is in the detail section).
6 Select a *Data Pipeline* and a *Data field* from the toolbar.
7 To specify a calculation: right-click on the selected calculation and click on the *Calculations* menu item. Select a calculation in the *Calc Type* field and select a group in

Reset Group field.

DBtext

Links an empty field to a field in the *Data* tab.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on the **DBtext** icon  and click on the location of your choice in the report (it is often in the detail section).
6 Select a *Data Pipeline* and a *Data field* from the toolbar.

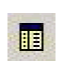
DBBarcode

Converts the data from a database field to a bar code symbol.

1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on the **DBBarcode** icon  and click on the location of your choice in the report (normally it is in the detail section).
6 Select a *Data Pipeline* and a *Data field* from the toolbar.

Adding a sub-report

A sub report is used when a relationship of one to many is present - this kind of relationship can also be called master detail relationship, it's when for example an order is associated to many order items or when a box is associated to many notes. Many sub-reports can be included in the same report.

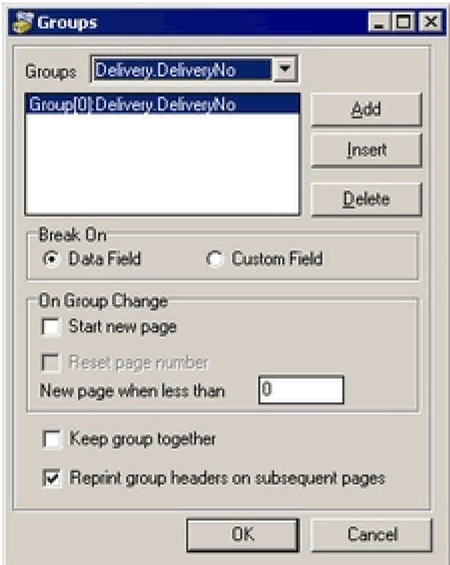
1 Click on **Inventory**->**Report** from the *Main Window*.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on the **SubReport** icon  and click on the location of your choice in the report (normally it is in the detail section).
6 Select a *Data Pipeline* from the toolbar.

Adding a group

A group is used to gather information that is similar in order to separate it from the other data. Groups are usually used to facilitate the sorting and the calculation of certain fields. For example one could group a report by department in order to start a new page every time a new department appears in the data. Another example would be to facilitate the calculation of totals for every price code encountered.

1 Click on **Inventory**->**Report** from the *Main Window*.

2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Design** tab.
5 Click on **Report -> Groups**. A window appears.



6 If the *Data Field* field is checked off, one will be able to choose, in the drop -down list, all the fields available in the **Data** tab. If the *Custom Field* field is checked off, one will be able to choose, in the drop -down list, all the fields that have been created specifically for that report (ex: calculated fields, labels or titles, etc.)
7 To add or insert a group to the list, select it in the drop-down list (it will appear highlighted) and press the **Insert** or **Add** button.
8 To delete a group select it in the list of groups (it will appear highlighted) and press the **Delete** button.
9 To start a new page every time the data or custom field changes, check the *Start new page* check box.
10 To keep the group together in one page, check the *Keep group together* check box.
11 Perform all the other selections needed and press **OK**.

.

6.5.5 Working with the Data tab

All the following operations are available when opening a report in the *Report* module. The data tab is the section of the report builder that enables one to select the different fields that will be used to create the report. This section is generally for advanced users that have a very good understanding of the concept of tables as well as a thorough understanding of the way EDC functions.

Selecting a table (see also Tables 217 for more details on the different fields)

Before selecting a table, it is important to figure out what will be the master/detail relationship; in other words which table will have prominence over the other(s). For example, if one wants to create an inventory report with boxes and files, one would probably specify that the Box table would be the master and the File table the detail.

1 In the Data tab, click on **File -> New**
2 Select the *Query Wizard* icon and press **OK**
3 Select a table (it will appear highlighted) and press on the right arrow to send the table in the Selected tables view.
4 The table names that will appear in bold are usually related tables that can be added at the same time when using joined data views. It is better to use separated table views if one is starting to work with reports since the links between the tables are visible.
5 Click on click on Finish or click on the Next button if you want to specify the fields, the calculations, the groups, the search option

Note: When using joined data views, different join types are available.

Options

Tables (see also Tables 217)

This tab shows all the tables available (at the top) and all the tables that are used in the report (at the bottom). To add a table to a report, double click on it's name (in the list at the top) and it should appear in the list at the bottom. To remove a table from a report, double click on it's name (in the list at the bottom) and it should disappear from the list.

Table: Table selected

Table Name: Name of the table

SQL_Alias: Name of the table in SQL

Join Type: Different join types available (to edit a join type, press on the **More** button)

- Inner Join : It discards all rows from the result table that don't have corresponding rows in both source tables.

- Full Outer Join : Retains all the unmatched rows from both source tables.

- Left Outer Join : It preserves the unmatched rows from the left table but discards the unmatched rows from the right table.

- Right Outer Join : It preserves the unmatched rows from the right table but discards the unmatched rows from the left table.

Fields (see also Tables 217)

This tab shows all the fields available (at the top) and all the fields that are used in the report (at the bottom). To add a field to a report, double click on it's name (in the list at the top) and it should appear in the list at the bottom. To remove a field from a report, double click on it's name (in the list at the bottom) and it should disappear from the list.

Calculations

This tab allows the addition of calculated fields to the report (ex: sum, count, average, maximum, minimum, expression).

Adding a normal calculation: Select a field in the list at the top (it will automatically be added to the bottom list) and select a function in the drop down list of the *Function* column (ex: sum, count, avg, min, max).

Sum: This calculation will do the sum of the selected field.
Count: This calculation will do the count of the selected field.
Avg: This calculation will do the average of the selected field.
Min:This calculation will show the minimum value of the selected field.
Max:This calculation will show the maximum value of the selected field.

Adding an expression: Select a field in the list at the top (it will automatically be added to the bottom list) and select the "expression" function in the drop down list of the *Function* column. Enter the expression in the *Expression* column.

Useful expressions:

For box bar codes the expression entered will be:

CONCAT(CONCAT(CONCAT(CONCAT(CONVERT ('1', SQL_CHAR), ' '), CONVERT (Box.CustNo, SQL_CHAR)), ' '), CONVERT (BoxDDNo, SQL_CHAR))

For file bar codes the expression entered will be:

CONCAT(CONCAT(CONCAT(CONCAT(CONVERT ('2', SQL_CHAR), ' '), CONVERT (File_TABLE.CustNo, SQL_CHAR)), ' '), CONVERT (File_TABLE.FileDDNo, SQL_CHAR))

For box history activities:

if(box_history.Activity=1, 'IN', if(box_history.Activity=2, 'OUT', if(box_history.Activity=3, 'SELECTED', if(box_history.Activity=5, 'IN TRANSIT', if(box_history.Activity=8, 'ON DISPOSAL', if(box_history.Activity=9, 'ON TRANSFER', if(box_history.Activity=10, 'ON DELETION', if(box_history.Activity=11, 'DELETED', if(box_history.Activity=12, 'DESTROYED', if(box_history.Activity=13, 'TRANSFERRED', if(box_history.Activity=14, 'IN (IN-HOUSE)', if(box_history.Activity=15, 'OUT (IN-HOUSE)', if(box_history.Activity=36, 'REVISED', if(box_history.Activity=35, 'SAMPLED', if(box_history.Activity=37, 'SENT TO DEPOT', if(box_history.Activity=27, 'DESTROYED (IN-HOUSE)', if(box_history.Activity=32, 'PRINTED',if(box_history.Activity=39, 'ADDED',if(box_history.Activity=6, 'MOVED', 'end'))))))))))))))))))))

Group (see also Adding a group** 143**)

This tab is used to add groups to a report.

Adding a group to a report: Select a field in the list at the top (it will automatically be added to the bottom list). The report will be grouped according to the fields selected.

EX: If you want a report to be grouped by customer, by department and then by owner, you would select CustNo, MainDeptNo and BoxOwner (in this exact order) in the top window. If one changes the order of the selected fields (BoxOwner, MainDeptNo, Custno) it would mean that the boxes on the report would be sorted first by owner, then by department and finally by customer.

Note: Groups allow the report document to be organized into sets of rows that share a common value. However, groups can only function if the field to which they are assigned has been used to sort the data. If you associate a group with a field, but do not sort the data by that field, then the group will still function. That is, the group will generate a group footer and group header each time

the field value changes, but because the data is not sorted properly, the group will appear to generate at random. Whenever you see a group generating too many times, check to make sure the data is sorted properly.

Search

This tab is used to add search criteria to a report.

Adding a search criterion to a report: Select a field in the list at the top (it will automatically be added to the bottom list). Select an operator (=, <>, <, <=, >, >=, like, not like, between, not between, in list, not in list, blank, not blank) and enter a value.

AutoSearch : Check off the *AutoSearch* checkbox if you want the search criteria to appear in the preview tab of the report.

Mandatory : Check off the *Mandatory* checkbox if you want the search criteria to be a mandatory step before the generation (or the preview) of the report takes place.

Sort

This tab is used to determine the sorting order of a report.

Adding a sorting criterion to a report: Select a field in the list at the top (it will automatically be added to the bottom list). The report will be grouped according to the fields selected.

EX: If you want a report to be sorted by customer, by department and then by owner, you would select CustNo, MainDeptNo and BoxOwner (in this exact order) in the top window. If one changes the order of the selected fields (BoxOwner, MainDeptNo, Custno) it would mean that the boxes on the report would be sorted first by owner, then by department and finally by customer.

Note: When using groups in your report, make sure that the sorting order and the order of the groups is the same. If it is not, then the report will not sort the data properly.

Desc (z > a) : Check off the *Desc (z > a)* checkbox if you want the data to be sorted in a manner contrary to the alphabetical order.

SQL

This tab allows one to see, copy and edit (if necessary) the SQL statement that is at the basis of the report. If the SQL statement is modified, the other tabs will be disabled and the SQL statement will prevail.

6.6 Internal Location

6.6.1 Overview (Internal Location)

This module allows to define storage locations used for active boxes and files within the organization. Furthermore, reports for internal locations can be produced to verify the space availability.

Available report

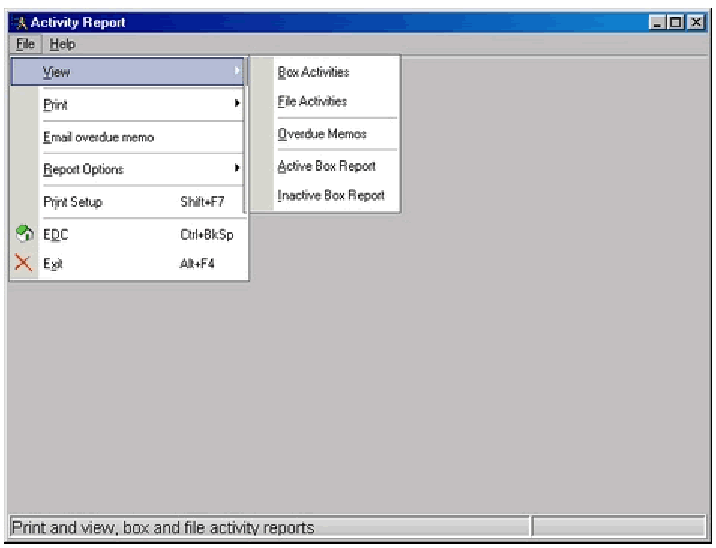
- list of internal locations, including their status

Fields 148 (see the next section)

Tasks

- Adding or editing internal locations 149
- Deleting internal locations 149
- Viewing or printing a list of internal locations and their status 149
- Printing an internal location label 150

Module's window



6.6.2 Fields (Internal Location)

Location
Required alphanumeric field containing a maximum of 20 alphanumeric characters. This field possesses a mask 229 defined in the *Location Mask* 55 field of the *Customer Information* module
This field indicates the location that will appear in the drop-down list associated with the *Location* field of the *Box* and *File* modules.

Note : The location mask should be carefully thought out so that it accurately reflects the physical storage organization.

Type
Choice field that can contain "BOX" or "FILE".
Indicates what kind of document will be stored in this storage space.

Used
Indicates the number of documents stored in this location. It is automatically updated by the

system and allows to quickly verify the inventory by producing a report. The value of this field can be edited in order to make corrections.

Out
Indicates the number of documents (within this location) that are out. It is automatically updated by the system and allows to quickly verify the inventory by producing a report. The value of this field can be edited in order to make corrections.

Capacity (present when the value of the *Type* field is "BOX")
Numeric field that can contain up to the "99999999" number.
Indicates the number of boxes that this location could contain.

6.6.3 Adding or editing internal locations

Internal storage spaces must be created before entering active boxes and files in the inventory.

1 Click on **Inventory**->**Internal Location** from the *Main window*.
2 Perform one of the following actions :
- To create, click on the **Add** button.
- To edit, select the desired location and click on the **Edit** button.

3 Enter the information in the appropriate fields 148.
4 Click on the **Accept** button.

6.6.4 Deleting internal locations

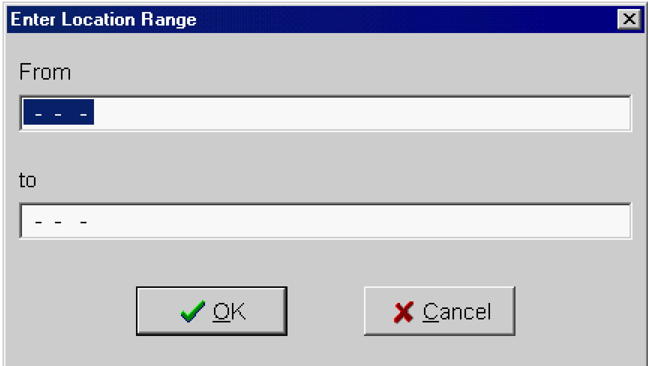
1 Click on **Inventory**->**Internal Location** from the *Main window*.
2 Find the location to be deleted.
3 Click on the **Delete** button and confirm the operation.

Note : In order to be deleted an internal location must be empty, otherwise the system will not proceed and an error message will be displayed.

6.6.5 Viewing or printing a list of internal locations and their status

1 Click on **Customer**->**Internal Location** from the *Main window*.
2 Click on **File**->**View Report|Print Report**. A dialog box appears.

3 Click on the **Yes** or **No** button, depending on the report to be produced. A window is displayed.



4 Enter the location range to include in the report and press **OK**.

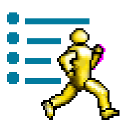
6.6.6 Printing an internal location label

1. Click on **Customer**->**Internal Location** from the *Main window*.
2. Find the wanted location.
3. Click on **File**->**Print Thermal Label**
4. The thermal label for the specific location will automatically be printed.

6.7 Activity Report

6.7.1 Overview (Activity Report)

This module allows to view or print activity reports for boxes or files and overdue memos (for boxes and files that are out) for a specific time period.



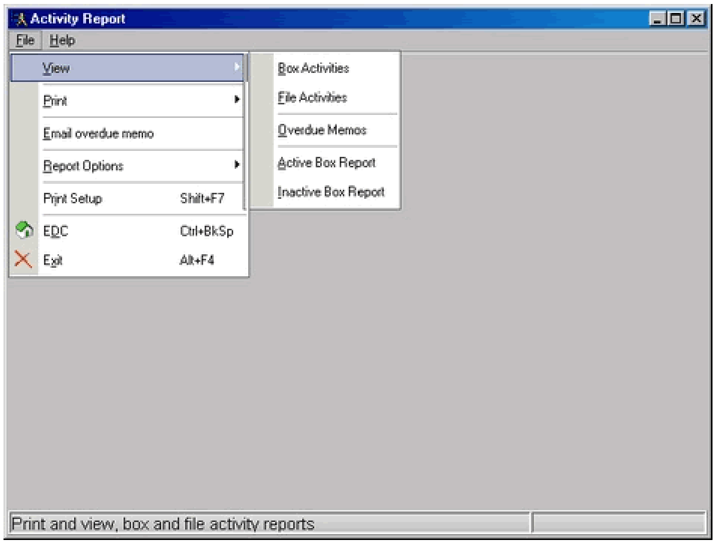
Available reports

- activity of all boxes or files for a specific period
- activity of boxes and files from a department for a specific period
- overdue memos for a specific period
- report of active boxes for a specific period and for a specific number of times taken out
- report of inactive boxes for a specific period, sorted by entry date in the system

Tasks

- Viewing or printing boxes or files activity reports 151
- Viewing or printing overdue memos 152
- Viewing or printing a report of active or inactive boxes 152
- Emailing an overdue memo 154

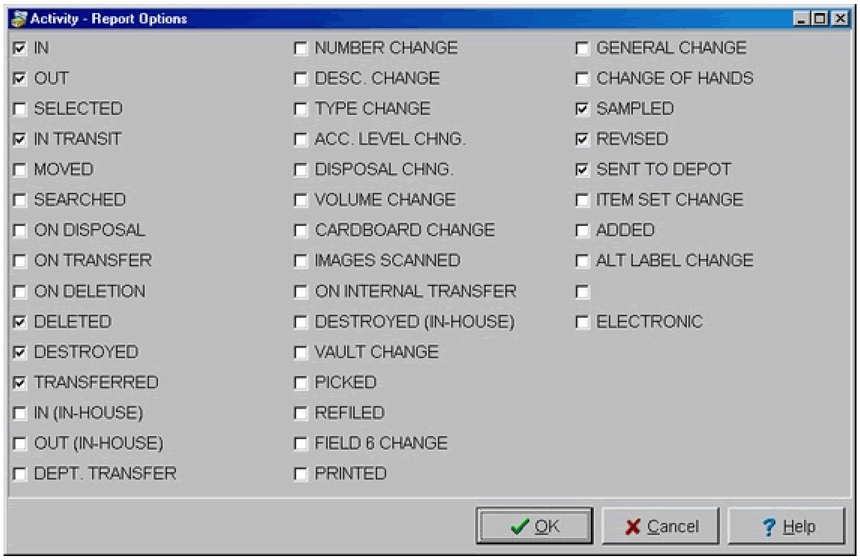
Module's window



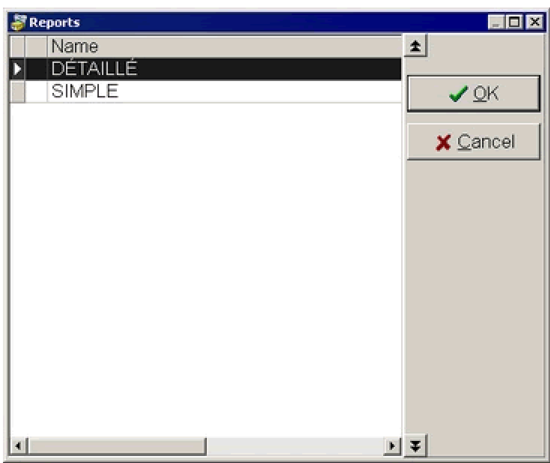
6.7.2 Viewing or printing activity report for boxes or files

1. Click on **Inventory**->**Activity Report** from the *Main window*.
2. Click on **File**->**Report Options**->**Box|File** and choose a predefined report or modify the presence and position of fields in the reports.
3. Click on **File**->**View|Print**->**Box Activities|File Activities**. A dialog box appears, allowing to specify if the report will be produced for one or all departments.

4. Press *Yes* to have the list of departments, select a department (it will appear highlighted) and click on the **Accept** button. A new window appears and allows to specify a interval of dates.
5. Specify the start date and the end date of the report and press **OK**. A window appears.
6. Specify the activities for which the report is produced.



7 Press **OK**. A window appears.



8 Select the type of report wanted and press **OK**.
9 The report is automatically shown or printed.

6.7.3 Viewing or printing overdue memos

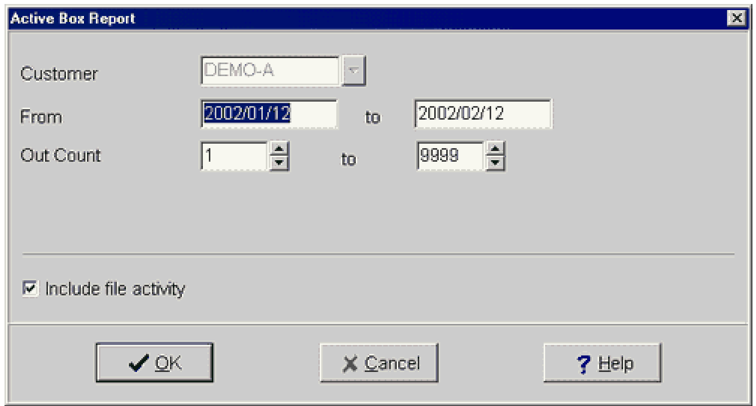
1 Click on **Inventory**->**Activity Report** from the *Main window*.
2 Click on **File**->**View Overdue Memos|Print Overdue Memos**.
3 Specify the start date and the end date in the window that is displayed and click on the **OK** button.
4 The sorting out is automatically done and the report is displayed or printed. When viewing the report, click on the **Close** button of the report's window to go back to the module.

Note : The overdue memo's template can be edited in the *Customer Information* module.

6.7.4 Viewing or printing the report of active or inactive boxes

Producing a report of active boxes

1 Click on **Inventory**->**Activity Report** from the *Main window*.
2 Click on **File**->**View|Print**->**Active Box Report**. A window appears.

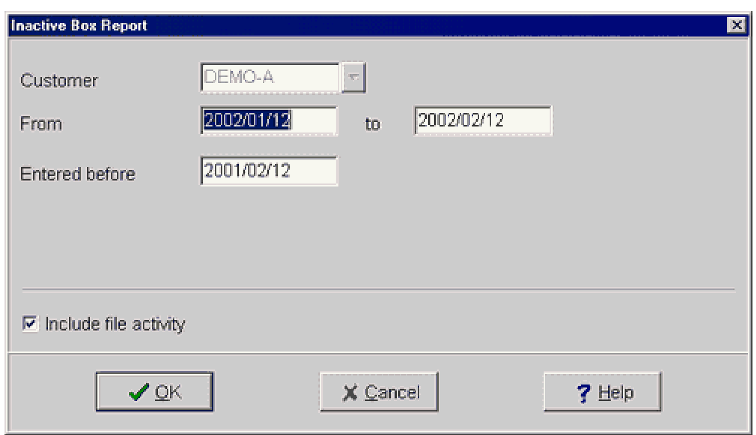


Note : *Customer* gives the code of the customer.
From to allows to specify a range of dates for the report.
Out Count allows to indicate that the report will include only boxes that have been retrieved a certain number of times.
Include file activity allows to indicate that the report must include also the files contained in the related boxes. When this option is checked off, the out count for a box will be more important, because it includes the out count of files within the box.

3 Enter the desired information in the appropriate fields and click on the **OK** button. The report is automatically produced.

Producing a report of inactive boxes

1 Click on **Inventory**->**Activity Report** from the *Main window*.
2 Click on **File**->**View|Print**->**Inactive Box Report**. A window appears.



Note : *Customer* gives the code of the customer.
From to allows to specify a range of dates for the report.
Out Count allows to indicate that the report will include only boxes entered before a certain date.
Include file activity allows to indicate that the report must include also the files contained in the related boxes. When this option is checked off, the number of inactive boxes will be less important, because as soon as a file is active within a box, the box is also considered

as being active.

3 Enter the desired information in the appropriate fields and click on the **OK** button. The report is automatically produced.

6.7.5 Emailing an overdue memo

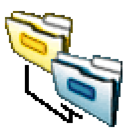
1 Click on **Inventory**->**Activity Report** from the *Main window*.
2 Click on **File**->**Email Overdue Memo**
3 In some cases, the following warning appears : "Some recipients do not have an email address, continue ?"
4 It is recommended to go in the Recipients 213 module to verify if all the recipients have an email address, in order to add this information when necessary.
5 When the information has been added, repeat steps **1** and **2**. Enter a range of dates for which the overdue memos should be sent out and press **OK**.
6 The memos will be sent out for all the recipients concerned.

Note: A paper out memo shall be printed for recipients that don't have an e-mail address set in the software.

6.8 In-house Disposal

6.8.1 Overview (In-House Disposal)

This module helps to manage the disposal of active (internal) documents. A list of boxes and files meeting certain criteria can be produced. Once the list is produced, documents can simply be disposed of in the appropriate manner. The lists are sorted out by location in order to accelerate the picking.



Available report

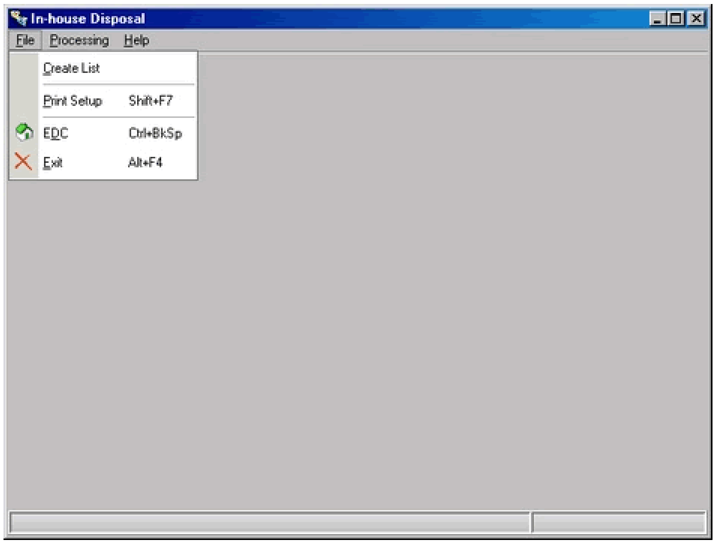
- picking list for active documents to be disposed of

Fields 155 (see the next section)

Tasks

- Producing a picking list of active documents to be destroyed, transferred, revised or sent for sampling 156
- Transferring active files to a box 157
- Transferring boxes to the off-site record center 157

Module's window



6.8.2 Fields (In-House Disposal)

When opening the module, all these fields are not viewable. They will be displayed when creating a disposal list. These fields can only be considered as filters for the production of disposal lists.

List
Choice field that can be set to "File" or "Box".
Allows to specify if the list is produced for files or boxes.

Disposal
Drop-down field that can contain "Non Confidential", "Confidential", "Permanent", "Send to depot", "Sample", "Revision" or "None".
Allows to specify the disposal mode of the current list.

From __to
Fields containing a predefined date mask.
Allows to specify an interval of dates that will be considered by the system to produce the list.

Type
Drop-down field that can contain all the document types defined in the *Retention Schedule* module.
Allows to specify the document type for which the list will be produced.

Department
Drop-down field that can contain all the departments defined in the *Department* module.
Allows to specify the department for which the list is produced.

Sub-department
Drop-down field that can contain all the sub-departments defined in the *Department* module.
Allows to specify the sub-department for which the list will be produced.

***By Internal Location**
Fields that can contain a location range.
Allows to specify a location range that will be considered by the system to produce the list.

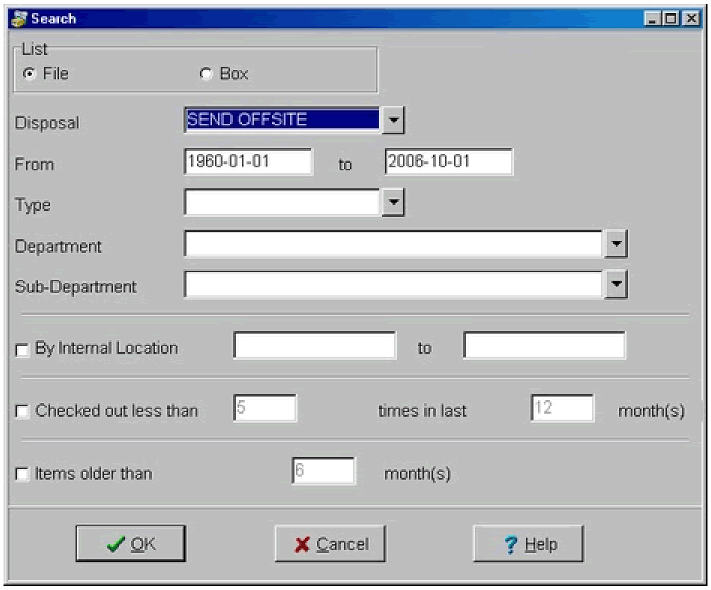
Checked out less than ... times in last ... month(s)
Checking off this field means that the list will include all the records checked out less than the specified number of times during the specified period.

Items older than ... month(s)
Checking off this field means that the list will include all the records created during the specified period.

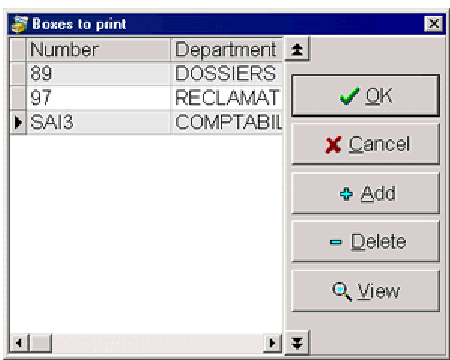
6.8.3 Producing a disposal list of active documents

This operation allows to produce a report by disposal mode. The criteria considered to sort out the records when creating a in-house disposal list must absolutely be defined here.

1 Click on **Inventory**->**In-house Disposal** from the *Main window*.
2 Click on **File**->**Create List**. A window appears.



3 Enter the search criteria in the appropriate fields 155 and click on the **OK** button. A window is displayed.



Note : This window contains all the records meeting the previously specified criteria.

4 To add boxes or files to the search results, click on the **Add** button. For files, specify if the addition must be done by description.
5 Enter a description (if "by description" has been specified for files) or an item number to indicate where to start on the list, click on the **OK** button and select the desired articles from the list. The selected articles will appear underlined.

6. Click on the **OK** button.
7. Delete items from the list by selecting them and clicking on the **Delete** button.
8. Click on the **OK** button to send the job to the printer.

Note: When entering several filters, the results will include only the items meeting all of the specified criteria.

6.8.4 Transfering active files to a box

1. Click on **Inventory**->**In-house Disposal** from the *Main window*.
2. Click on **Processing**->**Transfer Files to Boxes**->**With bar codes|Manually**.
3. Manually enter the RC number and click on the **OK** button or scan the label using a bar code reader.
4. Repeat step **3** as needed to add more files and click on the **Cancel** button to terminate the task.

Note : The software automatically updates the *Box* field of the *File* module and the *Files* field of the *Box* module.

6.8.5 Transfering boxes to the off-site record center

1. Click on **Inventory**->**In-house Disposal** from the *Main window*.
2. Click on **Processing**->**Transfer Boxes to IN TRANSIT**->**With bar codes|Manually**.
3. Manually enter the RC number and click on the **OK** button or scan the label using a bar code reader.
4. Repeat step **3** as needed to transfer more boxes and click on the **Cancel** button to terminate the task.

It is now time to indicate to the off-site record center that boxes have to be picked up. Then create an order and enter a box return (see "Returning documents to the off-site record center 204").

Note : The state of the boxes must be IN or OUT (IN-HOUSE) in order to be transferred to the Record Center. The software automatically updates the state of the boxes to IN TRANSIT.

6.8.6 Transfer files to open shelf at record center

1. Click on **Inventory**->**In-house Disposal** from the *Main window*.
2. Click on **Processing**->**Transfer files to open shelf at rec. center**->**With bar codes|Manually**.
3. Manually enter the RC number and click on the **OK** button or scan the label using a bar code reader.
4. Repeat step **3** as needed to transfer more boxes and click on the **Cancel** button to terminate the task.

It is now time to indicate to the off-site record center that boxes have to be picked up. Then create an order and enter a box return (see "Returning documents to the off-site record center 204").

Note : The state of the files must be IN or OUT (IN-HOUSE) in order to be transferred to the Record Center. The software automatically updates the state of the files to IN TRANSIT.

6.8.7 Destroy boxes or files

1. Click on **Inventory**->**In-house Disposal** from the *Main window*.
2. Click on **Processing**->**Destroy boxes | Destroy files** ->**With bar codes|Manually**.
3. Manually enter the RC number and click on the **OK** button or scan the label using a bar code

reader.

4 Repeat step **3** as needed to transfer more boxes and click on the **Cancel** button to terminate the task.

Note : The state of the boxes | files must be IN (IN-HOUSE) in order to be destroyed. The software automatically updates the state of the boxes | files to DESTROYED (IN-HOUSE).

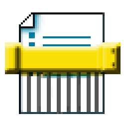
6.9 Disposal List

6.9.1 Overview (Disposal List)

This module is used to prepare disposal lists for semi-active documents (stored at an off-site record center). The disposal of records is a critical process that does not permit any error or mistake. That is why these lists must properly be authorized by the appropriate person before being processed.

After being electronically transmitted to the off-site record center, a paper copy of the list must be sent by courier or by fax. The disposal of boxes and files must be confirmed by checking off the appropriate spaces on the list for each item. Furthermore, the organization's signing officer defined at the off-site record center (or the creator of the list, if there is no signing officer appointed in the system) must initial each page of the disposal list and sign it at the end.

The lists are displayed in accordance with some parameters. When the organization's billing is made by department, the disposal lists will be divided accordingly and each part should be initialed and signed by its supervisor. Furthermore, when a department is associated to a document type (*Customer information* and *Retention Schedule* modules), the disposal lists are also separated accordingly and must be approved the same way.

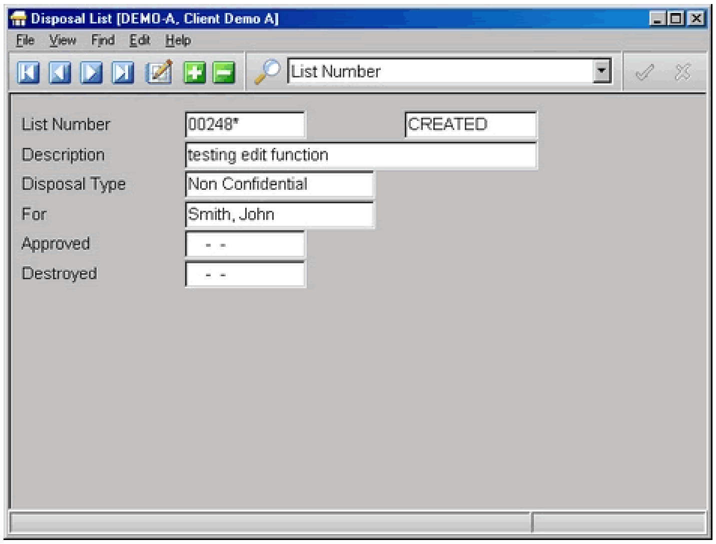


Fields 159 (see the next section)

Task

- Automatically producing a list of semi-active documents to destroy 161
- Manually producing a list of semi-active documents to destroy 160
- Deleting a disposal list 162
- Viewing items on a disposal list 162
- Viewing notes on a disposal list 162
- Viewing or printing the list of documents to be destroyed 162
- Viewing or printing the volume of boxes on a disposal list 163

Module's window



6.9.2 Fields (Disposal List)

List Number
Number generated by the system to identify this list. A number ending with an asterisk (*) indicates that a list has not yet been sent to the off-site record center or has been reset so changes could be done.

Status
Indicates where the list is in the treatment process :

CREATED : the list is being created (it can be edited or deleted);
LOCKED : the list has been electronically sent to the off-site record center and it cannot be edited or deleted;
AUTHORIZED : the list has been authorized (generally be sending a fax to the record center) and it cannot be edited or deleted anymore;
PROCESSED : the list has been destroyed and the concerned documents have been processed.

Description
Description of the current list.

Disposal Type
This field can take values "Confidential", "Non confidential", "Send to depot", "Sample" or " Revision".
It indicates the disposal mode that will be used to dispose of the documents (see the glossary 229 for more details on disposal modes).

For
Indicates the authorized user that has created the list. A list can only be modified or erased by its creator.

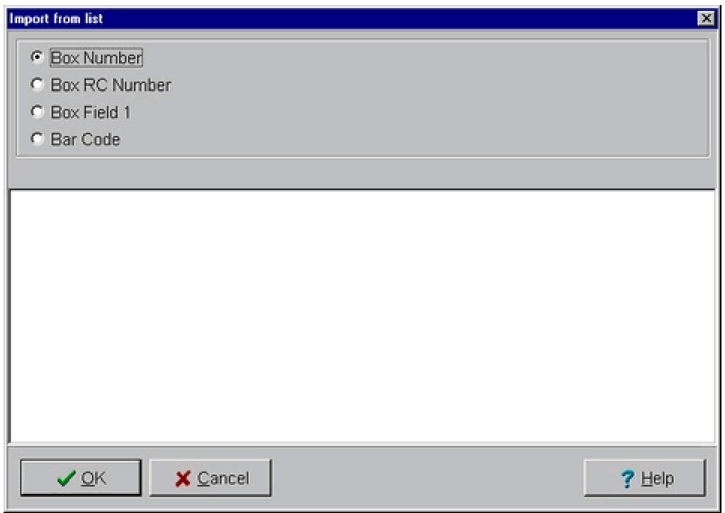
Approved
Indicates the date when the list has been authorized.

Processed
Indicates the date when the list has been processed.

6.9.3 Manually producing a list of semi-active documents to dispose of

1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Click on **File**->**Create List**.
3 Enter a summary description for the list.
4 Move to the *Disposition Type* field and click on the drop down buttons to select the desired disposal mode then click on the **Accept** button.
5 Perform one of the following actions :

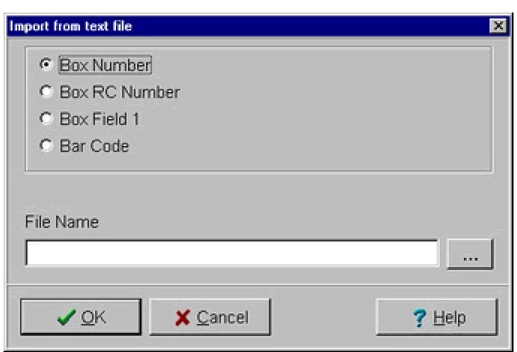
- Add items with **Edit**->**Add Boxes**. The added documents must be in the IN state.
- Add items from a list by on **Edit**->**Add from list**. A window appears



Check off the related option and write the corresponding information in the empty field at the bottom and press **OK**. *Example:* if you want to add boxes by box number, check the *Box number* option and add all the box numbers in the list at the bottom.

The software will automatically add the item(s). If the software does not find the information an error message will appear.

- Add items from a list by on **Edit**->**Add from text file**. A window appears



According to the document type that is ordered, check off the related options. *Example:* if you want to add boxes by box number, check the *Box number* option.

Enter a text file name or scroll the directories to find the right text file and press **OK**.

Note : The files that allow to add boxes that way must be text files and can only contain

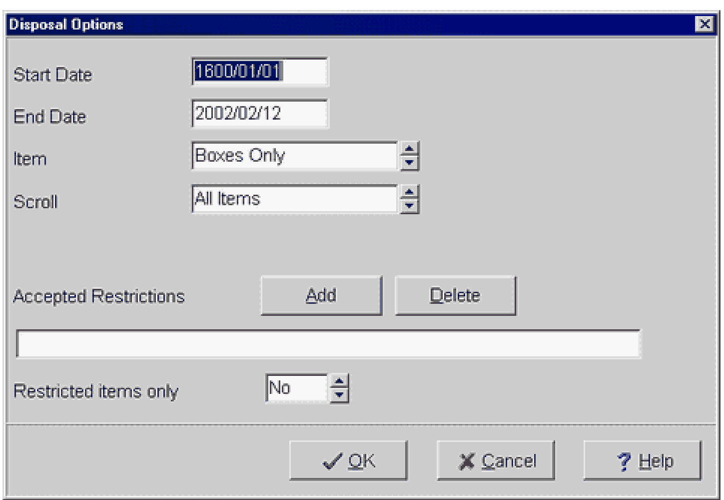
numbers displayed in columns.

- Remove items with **Edit**->**Remove Items**. Enter a number to specify where to start in the selection list.
- Remove items and change their disposal dates using **Edit**->**Remove Items, Change Date**. The item number specified tells the software where to start in the selection list. The selected items appear underlined.
- Add, edit or delete notes with **Edit**->**Notes**.
- Edit the list's description using **Edit**->**Edit**.

6. Perform list's verification by producing a report, for example, with **File**->**View report|Print report**.
7. Electronically send the list to the off-site record center using **File**->**Send list to Record Center**. The state of the list will be changed to LOCKED. It could not be edited or deleted unless being reset with the record center by clicking on **File**->**Reset List with Record Center**.
8. Print a list for authorization with **File**->**Print report**, check off each item, initialize and sign the list in the appropriate places and finally send the list (usually by fax) to the off-site record center.
9. The off-site record center will destroy the items on the list and send a disposal certificate to the organization after having received the authorized list. The state of the list will be changed to PROCESSED.

6.9.4 Automatically producing a list of semi-active documents to dispose of

1. Click on **Inventory**->**Disposal List** from the *Main window*.
2. Click on **File**->**Auto Create**.
3. Enter a summary description for the list.
4. Move to the *Disposal Type* field and click on the drop-down buttons to select the desired disposal mode then click on the **Accept** button. A window is displayed.



5. Enter the appropriate values :

- **Start Date** and **End Date** : range of disposal dates to include.
- **Item** : disposal is normally done for boxes, then the selection should be "Boxes Only" (the files included in those boxes will also be destroyed).
- **Scroll** : indicates which items will be searched when producing the list. When "Department", "Sub-department" or "Type" is selected, it must be specified in the next field.
- **Department, Sub-department** or **Type** : if the previous field contains "Department", "Sub-department" or "Type", this field allows to specify which one is concerned.
- **Accepted Restrictions** : indicates which restriction(s) 83 will be included in the disposal

list. Click on the **Add** button or the **Delete** button to modify the list of accepted restrictions.
Restricted Items Only : indicates if the disposal list produced must include only the restriction(s) specified in the previous field.

6 Click in the **Accept** button.
7 Edit the disposal list :
   - Add items with **Edit**->**Add Items**->**Boxes|Files.** The added documents must be in the "IN 229" state.
   - Remove items with **Edit**->**Remove Items**.
   - Remove items and change their disposal dates using **Edit**->**Edit Items, Change Date**. The item number specified tells the software where to start in the selection list. The selected items appear underlined.
   - Add, edit or delete notes with **Edit**->**Notes**.
   - Edit the list's description using **Edit**->**Edit**.
8 Verify the list by producing a report, for example, with **File**->**View report|Print report**.
9 Electronically send the list to the off-site record center using **File**->**Send list to Record Center**. The state of the list will be changed to "LOCKED". It cannot be edited or deleted unless being reset with the record center by clicking on **File**->**Reset List with Record Center**.
10 Print a list for authorization with **File**->**Print report**, check off each item, initialize and sign the list in the appropriate places and finally send the list (usually by fax) to the off-site record center.
11 The off-site record center will destroy the items on the list and send a disposal certificate to the organization after having received the authorized list. The state of the list will be changed to "DESTROYED". The state of each document on the list will be changed to "DESTROYED".

6.9.5 Deleting a disposal list

1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Click on **File**->**Delete List**.
3 A confirmation message appears : "Delete the current list ?".
4 Press *Yes* to delete the list, *No* or *Cancel* to abort the operation.

Note: The list can only be deleted when its state is CREATED.

6.9.6 Viewing items on a disposal list

1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Select the list for which the items have to be viewed.
3 Click **View**->**Items**.

6.9.7 Viewing notes on a disposal list

1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Select the list for which notes have to be viewed.
3 Click on **View**->**Notes**.

6.9.8 Viewing or printing the list of documents to be disposed of

1 Click on **Inventory**->**Disposal List** from the *Main window*.
2 Select the list for which a report has to be produced.
3 Click on **File**->**View Report|Print Report**.

Note : The software asks if the report must be produced for authorization when the list is in the "LOCKED" state. If yes, the report will include boxes to check and spaces for authorization signatures. This report is generally sent to the off-site record center (usually by fax or by courier) to authorize the final disposal of the documents on the list.
Furthermore, the list is divided by department when the organization is billed by department. The list is divided by document types when departments are associated with

document types (*Customer Information* 54 and *Retention Schedule* 79 modules).

6.9.9 Viewing or printing the volume of boxes on a disposal list

This operation can be useful to evaluate the cost of disposal of boxes.

1. Click on **Inventory**->**Disposal List** from the *Main window*.
2. Select the list for which the volume of boxes has to be evaluated.
3. Click on **File**->**View Volume|Print Volume**.

Note : This report only calculates the volume of boxes, files are not included. Furthermore, the list is divided by department when the organization is billed by department. The list is divided by document types when departments are associated to document types (*Customer Information* 54 and *Retention Schedule* 79 modules).

6.10 Transfer List

6.10.1 Overview (Transfer List)

This module allows to transfer semi-active documents from the off-site record center to another site. The transfer of documents requires several steps where verification and authorization play an important role.

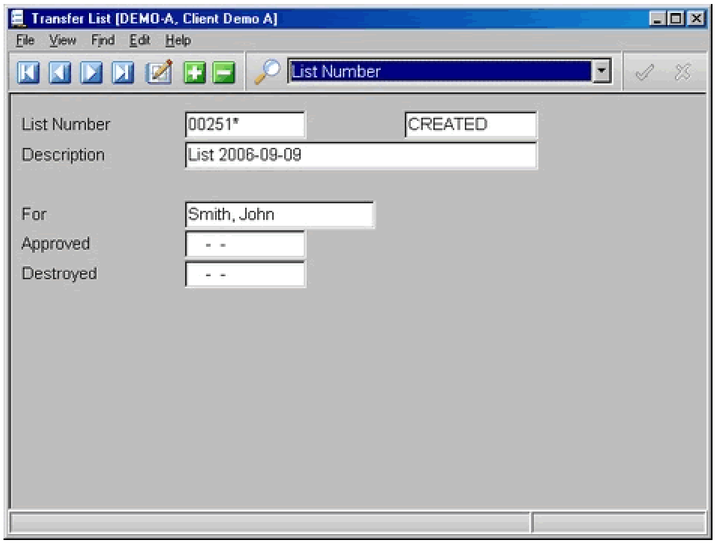
The transfer of documents follows the same process as for disposal lists (see "Overview 158" in the *Disposal List* module). The same steps are performed, for instance the creation, the printing, the verification, the authorization and the treatment of the list. Transfer lists are also displayed the same way, in accordance with the management parameters of the organization (defined in the *Customer Information* 54 and *Retention Schedule* 79 modules).

Fields 164 (see the next section)

Tasks

- Transferring semi-active documents to another site 164
- Deleting a transfer list 166
- Viewing items on a transfer list 166
- Viewing notes on a transfer list 166
- Viewing or printing the list of documents to be transferred 166
- Viewing or printing the volume of boxes on a transfer list 166

Module's window



6.10.2 Fields (Transfer List)

List Number
Number generated by the system to identify this list. A number ending with an asterisk (*) indicates that this list has not yet been sent to the off-site record center or that it has been reset with the record center so that changes could be made.

Status
Indicates where the list is in the treatment process :

CREATED : the list is being created (it can still be edited or deleted);
LOCKED : the list has been electronically sent to the off-site record center and it cannot be edited or deleted;
AUTHORIZED : the list has been authorized (generally by sending a fax to the off-site record center) and it cannot be edited or deleted;
TRANSFERRED : the list has been processed and the concerned documents have been transferred.

Description
Description of the current list.

For
Indicates the authorized user that has created the list. A list can only be modified or erased by its creator.

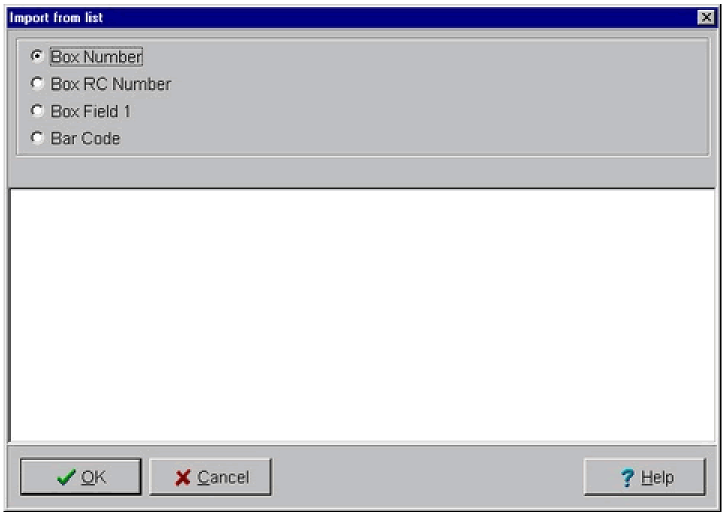
Approved
Indicates the date when the list has been authorized.

Processed
Indicates the date when the list has been processed.

6.10.3 Transfering semi-active documents to another site

1. Click on **Inventory**->**Transfer List** from the *Main window*.
2. Click on **File**->**Create List**.
3. Enter a description for the list and click on the **Accept** button.
4. Perform one of the following actions :
   - Add items with **Edit**->**Add Items**. The added documents must be in the "IN" state.

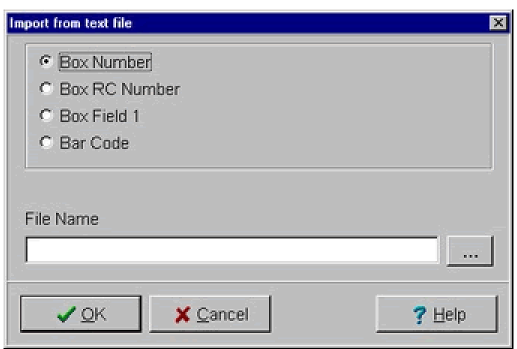
- Add items from a list by on **Edit**->**Add from list**. A window appears



Check off the related option and write the corresponding information in the empty field at the bottom and press **OK**. *Example:* if you want to add boxes by box number, check the *Box number* option and add all the box numbers in the list at the bottom.

The software will automatically add the item(s). If the software does not find the information an error message will appear.

- Add items from a list by on **Edit**->**Add from text file**. A window appears



According to the document type that is ordered, check off the related options. *Example:* if you want to add boxes by box number, check the *Box number* option.

Enter a text file name or scroll the directories to find the right text file and press **OK**.

Note : The files that allow to add boxes that way must be text files and can only contain numbers displayed in columns.

- Remove items with **Edit**->**Remove Items**.
- Add, edit or delete notes with **Edit**->**Notes**.
- Edit the list's description using **Edit**->**Edit**.

5 Verify the list by producing a report, for example, with **File**->**View Report|Print report**.

6 Electronically send the list to the off-site record center using **File**->**Send list to Record Center**. The state of the list will be changed to "LOCKED" , thus cannot be modified or deleted from this moment on, unless it is reset with the record center with **File**->**Reset List with Record**

Center to recover its "CREATED" state.

7 Print the list by clicking on **File**->**Print report**, press the **YES** button of the dialog box in order to specify that it is an authorization list and send the list to the off-site record center.
8 The record center will transfer the items on the list after having received the authorized list. The state of the list will be changed to "TRANFERED". The state of each document on the list will be changed to "TRANSFERED".

6.10.4 Deleting a transfer list

1 Click on **Inventory**->**Transfer List** from the *Main window*.
2 Click on **File**->**Delete List**.
3 A confirmation message appears : "Delete the current list ?".
4 Press *Yes* to delete the list, *No* or *Cancel* to abort the operation.

Note: The list can only be deleted when its state is CREATED.

6.10.5 Viewing items on a transfer list

1 Click on **Inventory**->**Transfer List** from the *Main window*.
2 Select the list for which the items have to be viewed.
3 Click on **View**->**Items**.

6.10.6 Viewing notes on a transfer list

1 Click on **Inventory**->**Transfer List** from the *Main window*.
2 Select the list for which the notes have to be viewed.
3 Click on **View**->**Notes**.

6.10.7 Viewing or printing the list of documents to be transferred

1 Click on **Inventory**->**Transfer List** from the *Main window*.
2 Select the list for which a report must be produced.
3 Click on **File**->**View Report|Print Report**.

Note : The software asks if the report has to be produced for authorization when the list is in the "LOCKED" state. If answering "Yes", the report will include boxes to check and spaces for authorization signatures. This report is generally sent to the record center (usually by fax) to give the final authorization for the transfer of the documents on the list.
Furthermore, the list is divided by department when the organization is billed by department. The list is divided by document types when departments are associated to document types (*Customer Information* 54 and *Retention Schedule* 79 modules).

6.10.8 Viewing or printing the volume of boxes on a transfer list

This operation can be useful to evaluate the cost of transferring boxes.

1 Click on **Inventory**->**Transfer List** from the *Main window*.
2 Select the list for which the volume of boxes has to be evaluated.
3 Click on **File**->**View Volume|Print Volume**.

Note : This report only calculates the volume of boxes, files are not included.
Furthermore, the list is divided by department when the organization is billed by department. The list is divided by document types when departments are associated to document types (Customer Information 54 and Retention Schedule 79 modules).

6.11 Deletion List

6.11.1 Overview (Deletion List)

This module allows to remove boxes and files from the inventory of semi-active documents. The resulting effect will be the cancellation of space for billing purposes. Only documents that are out ("OUT 229" state) can be deleted. The documents only are marked as "DELETED 229" and the information is not erased from the database. If a deleted document is returned to the off-site record center later, all that is needed is to reactivate it 98 (the history before deletion is preserved).

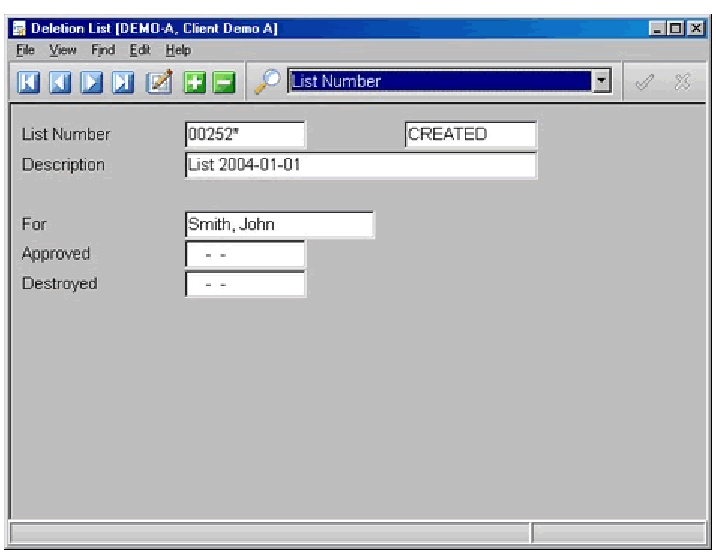
The deletion process is similar to the one for disposal of documents (see "Overview 158" in the *Disposal List* module), except for the signed authorization that is not required. Only creation, printing, verification and treatment steps are respected. Deletion lists are also displayed in accordance with the management parameters of the organization (defined in the *Customer Information* 54 and *Retention Schedule* 79 modules).

Fields 168 (see the next section)

Tasks

- Removing semi-active documents from the inventory 168
- Deleting a deletion list 168
- Viewing items on a deletion list 168
- Viewing notes of a deletion list 168
- Viewing or printing the list of documents to be removed from the inventory 169
- Viewing or printing volume of boxes on a deletion list 169

Module's window



6.11.2 Fields (Deletion List)

List Number
Number generated by the system to identify this list.

Status
Indicates where the list is in the treatment process :

CREATED : the list is being created (you can edit or delete a list in this state);
DELETED : the list has been sent to the off-site record center and can not be edited or canceled.
The deletion lists have this particularity to directly go from creation to treatment.

Description
Description of the current list.

For
Indicates the authorized user that has created the list. A list can only be modified or erased by its creator.

6.11.3 Removing semi-active documents from the inventory

1 Click on **Inventory**->**Deletion List** from the *Main window*.
2 Click on **File**->**Create List**.
3 Enter a description for the list and click on the **Accept** button.
4 Perform one of the following actions :
   - Add items with **Edit**->**Add Items**. The added documents must be in the "OUT" state.
   - Remove items with **Edit**->**Remove Items**.
   - Add, edit or delete notes with **Edit**->**Notes**.
   - Edit the list's description using **Edit**->**Edit**.
5 Verify the list by producing a report, for example, with **File**->**View Report|Print report**.
6 Electronically send the list to the record center by clicking on **File**->**Send list to Record Center**. The state of the list will be changed to "DELETED" thus cannot be modified or deleted from this moment on, unless it is reset with the record center with The state of each document on the list is changed to "DELETED".

Note : A document can be reactivated later (see "Reactivating a box or a file to the active inventory 98").

6.11.4 Deleting a deletion list

1 Click on **Inventory**->**Deletion List** from the *Main window*.
2 Click on **File**->**Delete List**.
3 A confirmation message appears : "Delete the current list ?".
4 Press *Yes* to delete the list, *No* or *Cancel* to abort the operation.

Note: The list can only be deleted when its state is CREATED.

6.11.5 Viewing items on a deletion list

1 Click on **Inventory**->**Deletion List** from the *Main window*.
2 Select the list for which the items have to be viewed.
3 Click on **View**->**Items**.

6.11.6 Viewing notes of a deletion list

1 Click on **Inventory**->**Deletion List** from the *Main window*.
2 Select the list for which the notes have to be viewed.

3 Click on **View**->**Notes**.

6.11.7 Viewing or printing the list of documents to be removed from the inventory

When the organization's billing is based on departments, the list is divided consequently. When departments are associated with a document type, the deletion lists are divided by document type.

1 Click on **Inventory**->**Deletion Lists** from the *Main window*.
2 Select the list for which a report must be produced.
3 Click on **File**->**View Report|Print Report**.

6.11.8 Viewing or printing volume of boxes on a deletion list

This operation can be useful to evaluate the cost savings associated with the removal of boxes from inventory.

1 Click on **Inventory**->**Deletion List** from the *Main window*.
2 Select the list for which the volume of boxes has to be evaluated.
3 Click on **File**->**View volume|Print Volume**.

Note : This report only calculates the volume of boxes, files are not included.

6.12 Box and File Maintenance

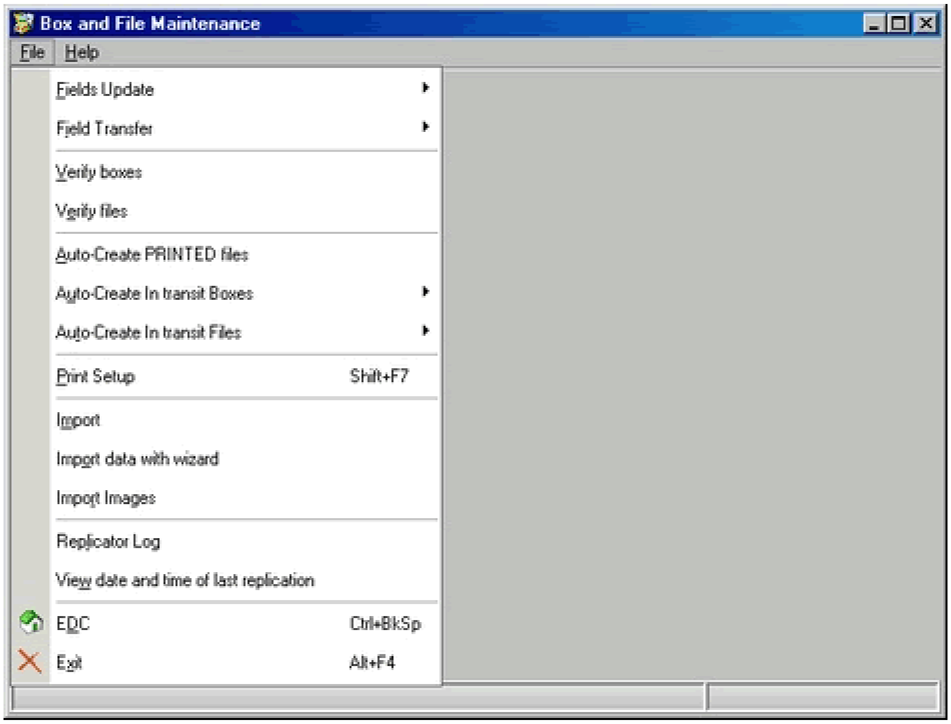
6.12.1 Overview (Box and File Maintenance)

This module allows to perform several modifications for boxes and files with the same operation. First, this operation is time-saving. Second, it is useful and extremely reliable, especially when the same description must be entered for hundreds of boxes already registered in the system.

Tasks

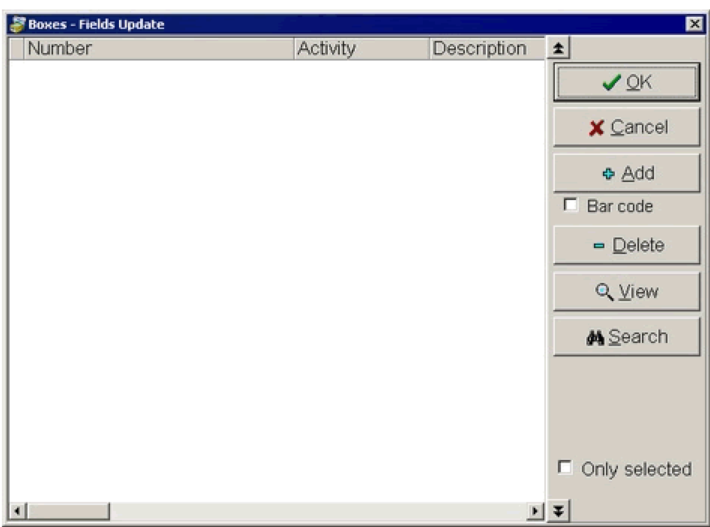
- Updating fields for several records simultaneously 170
- Transferring field content for several records simultaneously 173
- Verifying the integrity of boxes and files 175
- Auto-creating printed files 176
- Auto-creating In-transit boxes 177
- Auto-creating In-transit files 179
- Importing data
- Importing data with a wizard 182
- Importing images 192
- Viewing the replication log 193
- Viewing the date and time of the last replication 193

Module's window

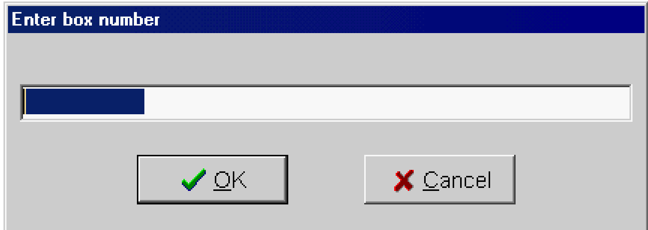


6.12.2 Updating fields for several records simultaneously

1 Click on **Maintenance**->**Box and File Maintenance** from the *Main window*.
2 Click on **File**->**Fields Update**->**Boxes|Files**. A window appears.

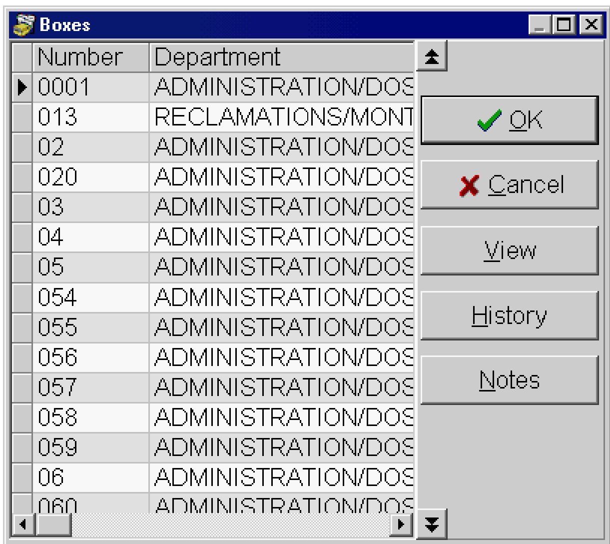


3 Click on the **Add** button to select documents. A new window appears.

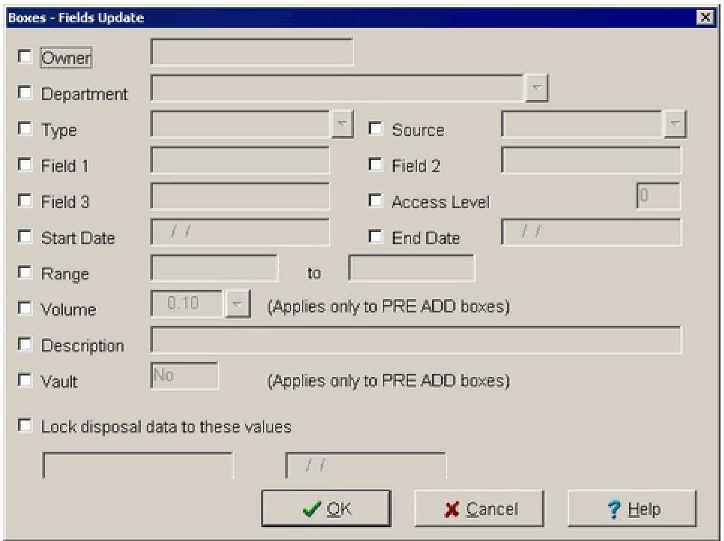


Note : As for files, a dialog box appears previously and asks to specify if the selection will be established by number or description.

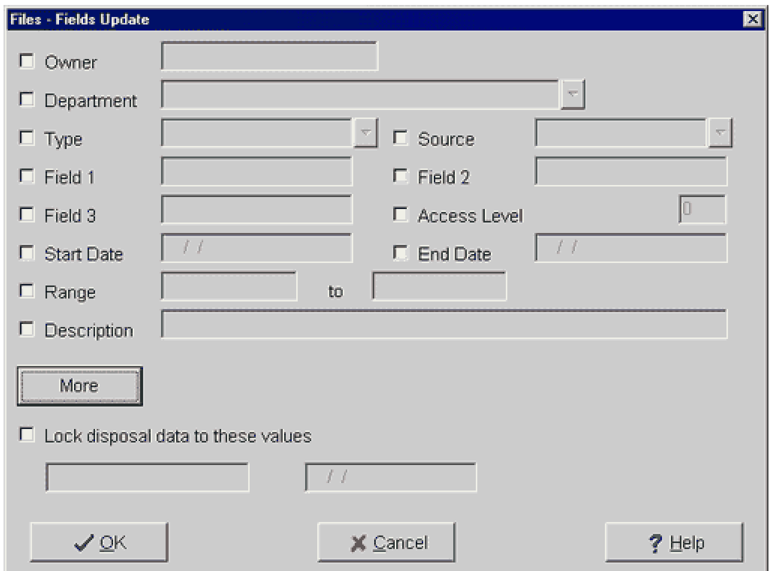
4 Enter a number or a description to indicate where to start in the selection list and press **OK**. The list of documents appears.



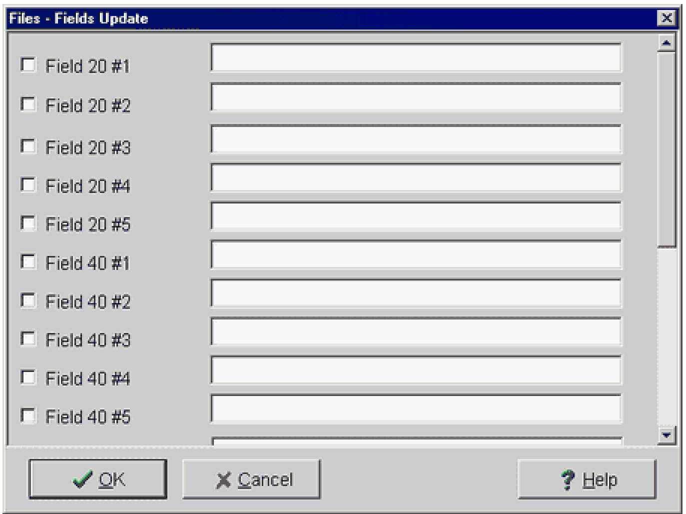
5 Select the desired documents (they will appear highlighted) and press **OK** . The window opened in **3** reappears and contains all the documents previously selected.
6 To remove documents, select them and click on the **Delete** button. A dialog box appears for each deletion and asks to confirm the operation.
7 When all the documents desired are in the list press **OK**. A window appears and may be different, according to the option chosen in **2** (box or file update).



or



Note : When clicking on the **More** button, the following window appears. It allows to update the extra fields for files.



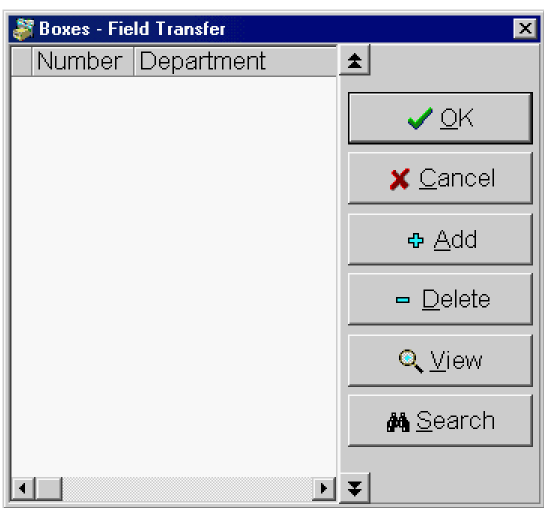
8 Check the fields to be modified (it will activate them) and enter the desired information. When all has been done, press **OK** to register the modifications that will be applied. The system automatically updates the relevant information in the inventory. All these modifications will be viewable in the *Box* and *File* modules (a general change will appear in the history of the selected boxes or files.)

9 The system will go back to the window opened in step **3**.

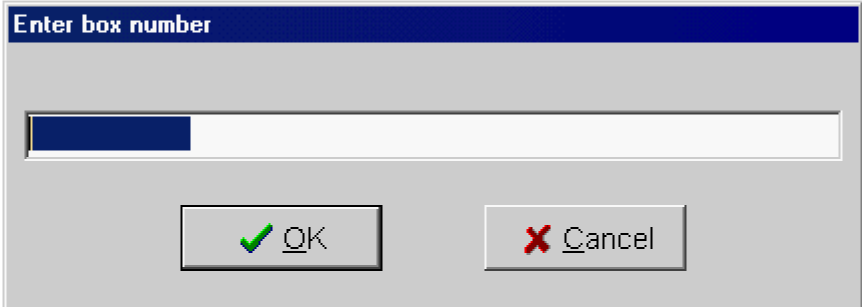
6.12.3 Transferring field content for several records simultaneously

1 Click on **Inventory**->**Box and File Maintenance** from the *Main window*.

2 Click on **File**->**Field Transfer**->**Boxes|Files**. A window appears.

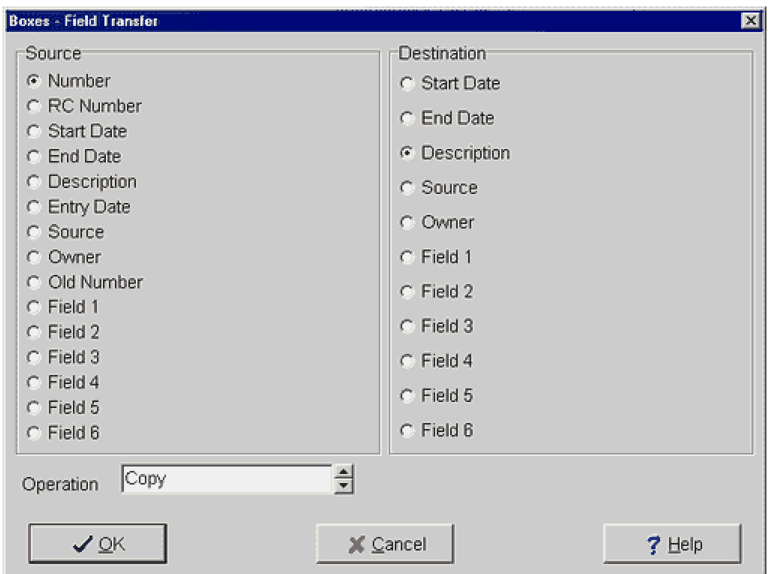


3 Click on the **Add** button to start a selection. A window opens.



Note : The same window is displayed for files, but the selection can also be done by description.

3 Enter a box or file number (or a description for files) then click on the **OK** button. A window containing the inventoried documents appears.
4 Select items then click on the **OK** button from this window. The window displayed in **2** appears again, containing the selection.
5 Click on the **OK** button to specify which field transfer has to be performed. The following window opens.

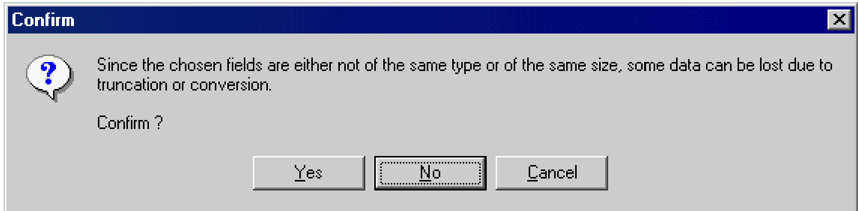


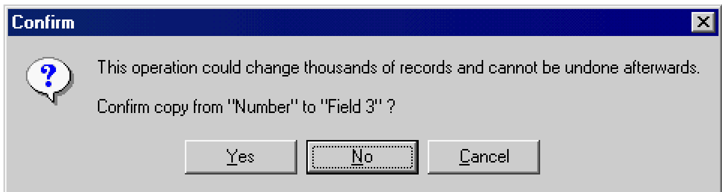
Note: The window displayed is for boxes, the file window is slightly different and shows the different extra fields used.

6 Check off the *Source* field and the *Destination* field then select the desired action with the choice button to the right of the *Operation* field. Three operations are available :

- *Copy* : the *Source* field content is copied in the *Destination* field and its original content is deleted. Then the same description is displayed in both of the fields simultaneously.
- *Swap* : the *Source* field content will be displayed in the *Destination* field and the *Destination* field content is displayed in the *Source* field. Then the original content of the two fields are still displayed but not in the same field.
- *Move* : the *Source* field content replace the *Destination* field content, deleting its original content. Because of the moving, the *Source* field is empty.

7 Click on the **OK** button to register the operation. A dialog box appears to confirm the operation. The following dialog boxes are also displayed for some operations.





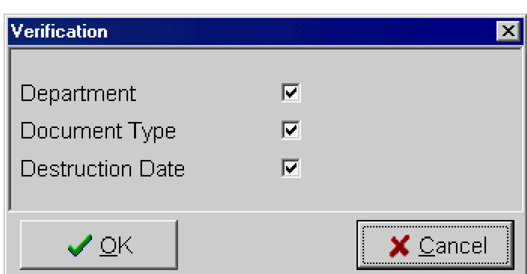
8 Click on the **Yes** button of each dialog box to confirm changes. A window appears.

9 Enter a password and click on the **Accept** button. The inventory is automatically updated by the system. The changes are viewable in the *Box* and *File* modules for the concerned documents.

6.12.4 Verifying the integrity of boxes and files

This option allows to verify the integrity of the database. This can be useful to correct errors due to data entry or importation.

1 Click on **Inventory**->**Box and File Maintenance** from the *Main window*.
2 Click on **File**->**Verify boxes|Verify Files**. A dialog box appears and asks if the report must be printed.
3 Click on the **Yes** button, if so desired. A window opens then on the screen.

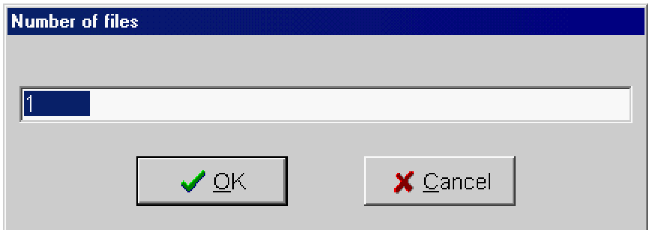


4 Check of the options (information) which will appear on the report and click on the **OK** button. The system automatically prints or displays the report.

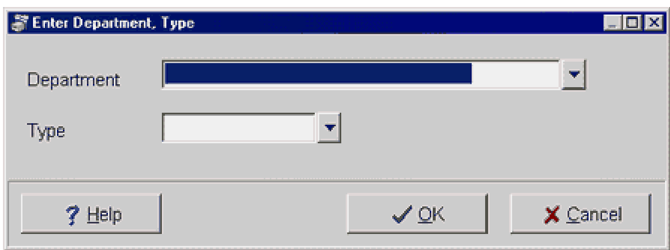
5 Click on the **Close** button to end the viewing.

6.12.5 Auto-creating printed files

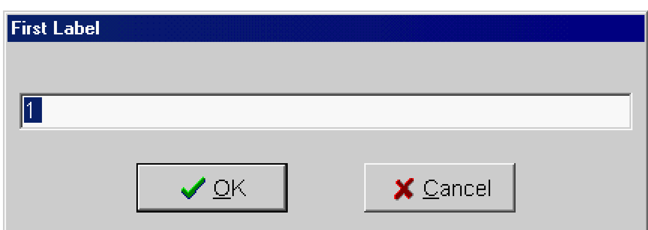
1 Click on **Inventory**->**Box and File Maintenance** from the *Main window*.
2 Click on **File**->**Auto-create PRINTED files**. A dialog box appears.



3 Enter a number of files to create and click on the **OK** button. A window is displayed.



4 Click on the drop-down button to the right of each fields to select a department and a document type in the lists that are displayed on the screen then click on the **Accept** button.
5 A window appears. Select a file label format in the list (it will appear highlighted) and press **OK** .
6 A window appears.



7 Enter a number to specify the location of the first label on the printed page.

Note : The label's format is predefined in the *Customer Information* module (see "Defining custom labels for boxes and files 61"). Some print options can be modified by clicking on **File**->**Print Setup**.

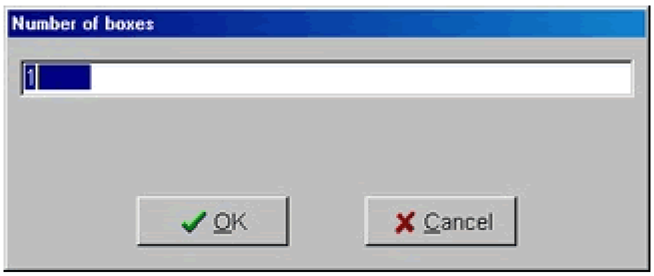
8 The files are automatically created in the system. Bar codes labels are printed according to internal parameters. A dialog box is displayed to confirm the creation.

9 Click on the **OK** button to terminate the operation.

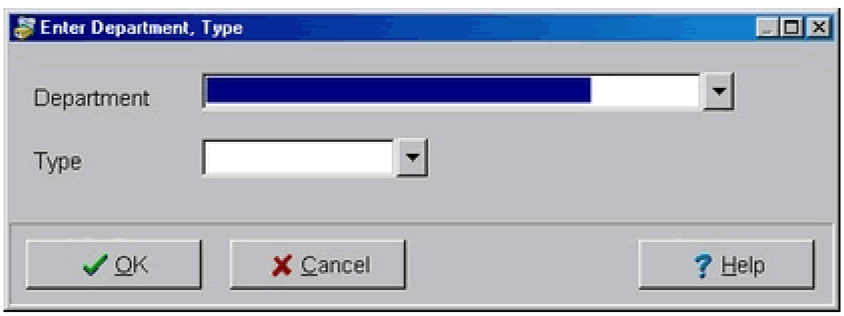
Note : An auto-created file is displayed in the *File* module. Its RC number is set by default as its number and its state is"PRINTED".

6.12.6 Auto-creating In-Transit Boxes

1 Click on **Inventory**->**Box and File Maintenance** from the *Main window*.
2 Click on **File->Auto-Create In-Transit Boxes->Thermal / Laser.** One would choose *Thermal* to print thermal labels and *Laser* to print laser labels for these new items. A window appears.



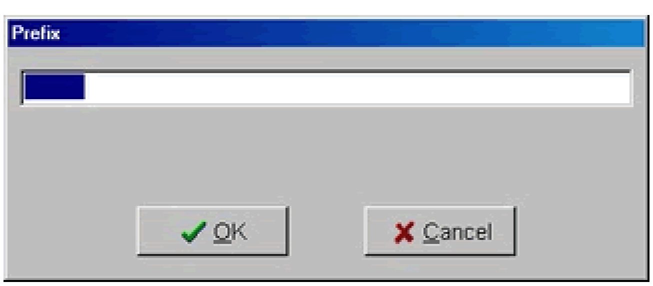
3 Enter the number of boxes you want to create and press **OK**. A window appears.



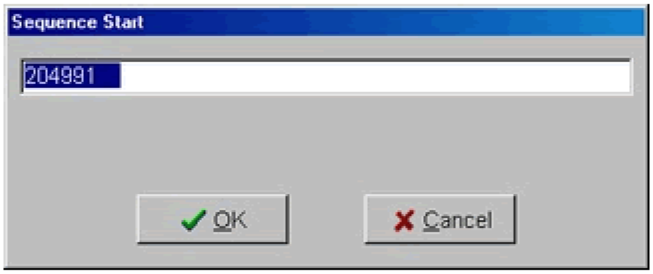
4 Click on the drop-down button next to the *Department* field, select a department in the list (it will appear highlighted) and press **OK**.
5 Click on the drop-down button next to the *Type* field, select a type in the list (it will appear highlighted) and press **OK**.

Note: In order to choose the right document type (retention calendar) for the boxes you want to create, you can consult the information related to each document type by selecting a type and clicking on the **View** button. The notes related to each document type can also be consulted, copied, printed or saved, by selecting a type and pressing on the **Notes** button.

6 When the department and document type have been selected, press **OK**. A window appears.



7 Enter a prefix that will precede the automatic box number given by the system. Press **OK**. The prefix can be numerical or alphanumerical. A window appears.



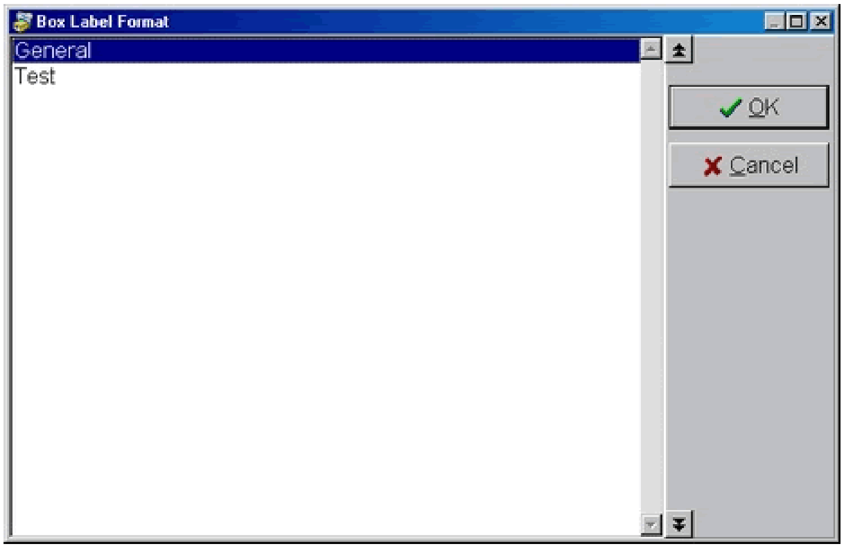
8 Enter a value from which the creation of box numbers will start. This value can only be numerical. Once the sequence start has been entered, press **OK**. A window appears.

Ex: The prefix 'DOC-' was previously added and the sequence start entered was 204991. The number of boxes to create was 5, thus the box numbers will be :

DOC-204991
DOC-204992
DOC-204993
DOC-204994
DOC-204995

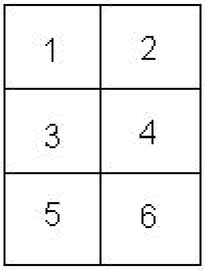
9 Enter the number of copies to make for each label and press **OK**.

** If you previously selected *Laser* at step **2**, a window appears.



Select a file label format (these formats can be modified in the customer Information module; for more information consult the Defining custom labels 61 topic).

The system will then prompt you to enter the position of the first avery label at which it should start printing. Here is an example of a typical page of avery labels used to print box labels:

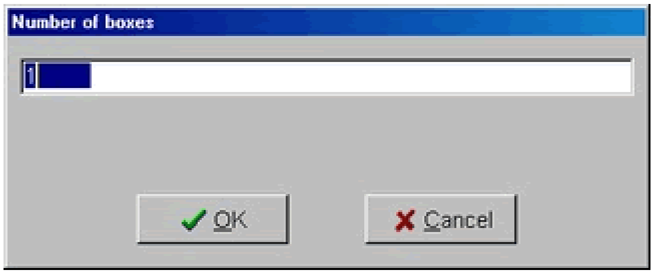


Note: The numbers indicate the printing order of the labels. See also the list of supported Avery labels 61 in the rubric "Defining custom labels for boxes and files".

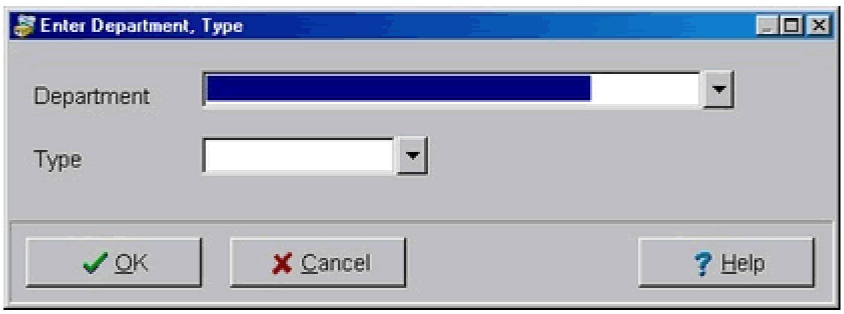
10 The labels are automatically printed for the boxes that were created in the system.

6.12.7 Auto-Creating In-Transit Files

1. Click on **Inventory**->**Box and File Maintenance** from the *Main window*.
2. Click on **File->Auto-Create In-Transit Files->Thermal / Laser.** One would choose *Thermal* to print thermal labels and *Laser* to print laser labels for these new items. A window appears.



3 Enter the number of files you want to create and press **OK**. A window appears.

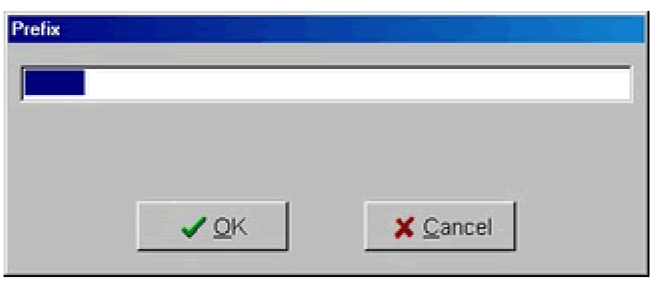


4 Click on the drop-down button next to the *Department* field, select a department in the list (it will appear highlighted) and press **OK**.

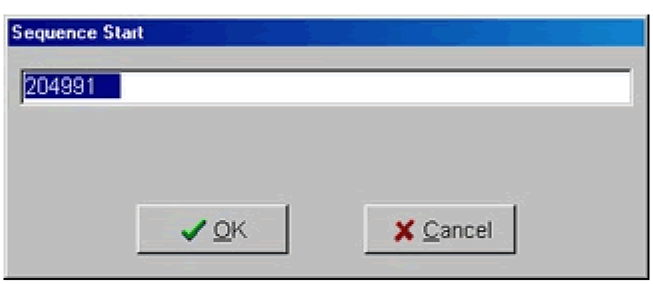
5 Click on the drop-down button next to the *Type* field, select a type in the list (it will appear highlighted) and press **OK**.

Note: In order to choose the right document type (retention calendar) for the files you want to create, you can consult the information related to each document type by selecting a type and clicking on the **View** button. The notes related to each document type can also be consulted, copied, printed or saved, by selecting a type and pressing on the **Notes** button.

6 When the department and document type have been selected, press **OK**. A window appears.



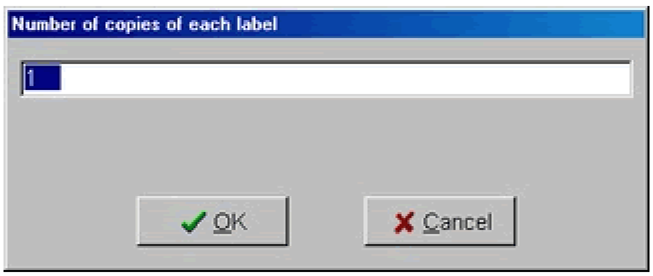
7 Enter a prefix that will precede the automatic file number given by the system. Press **OK**. The prefix can be numerical or alphanumerical. A window appears.



8 Enter a value from which the creation of file numbers will start. This value can only be numerical. Once the sequence start has been entered, press **OK**. A window appears.

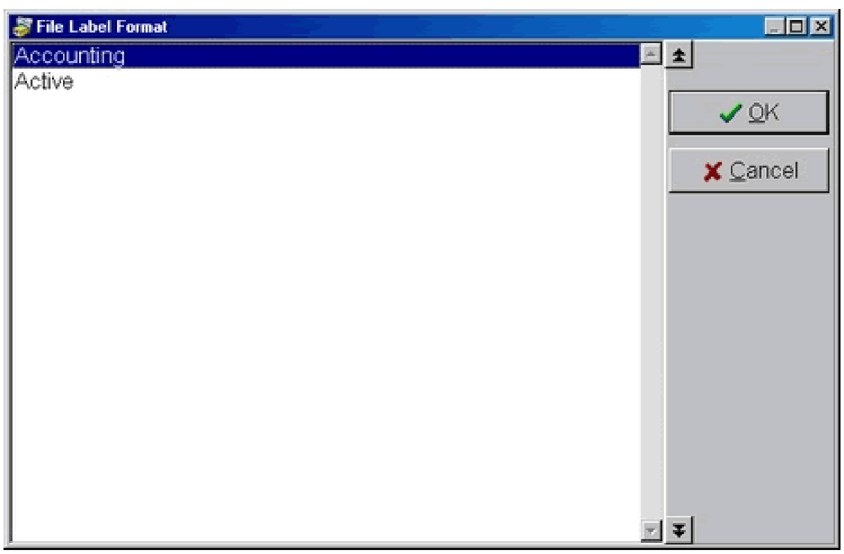
Ex: The prefix 'DOC-' was previously added and the sequence start entered was 204991. The number of files to create was 5, thus the file numbers will be :

DOC-204991
DOC-204992
DOC-204993
DOC-204994
DOC-204995



9 Enter the number of copies to make for each label and press **OK**.

** If you previously selected *Laser* at step **2**, a window appears.



Select a file label format (these formats can be modified in the customer Information module; for more information consult the Defining custom labels 61 topic).

The system will then prompt you to enter the position of the first avery label at which it should start printing. Here is an example of a typical page of avery labels used to print file labels:

1	2
3	4
5	6

Note: The numbers indicate the printing order of the labels. See also the list of supported Avery labels 61 in the rubric "Defining custom labels for boxes and files".

10 The labels are automatically printed for the files that were created in the system.

6.12.8 Importing data with a wizard

6.12.8.1 Underlying principle of data importation

1) Data is created in an excel or csv file (in this case the data will be the information about boxes or files that one imports, it can be the box number, the department, etc.)

2) The wizard enables you to associate values from the data file or set default values for certain fields. Then, certain options can be specified so that the process can be somewhat faster or more specific.

3) The wizard creates a description file (the role of the description file is to pinpoint where to find the data in the data file, and in which field to put it in EDC RC).

4) A test can be performed by the import wizard to make sure that there are no problems with the description file (this is highly recommended). A report is then issued to help correct mistakes (when the case arises).

5) The importation takes place according to the settings previously chosen and records are added or updated in EDC RC.

See the related topics for more information :
- Step by step procedure 183
- Check List 191

6.12.8.2 Step by step procedure

WARNING

This operation ***cannot be undone***. Performing a back up of the database is highly recommended before going any further. This should be done in case boxes or files are added by mistake, or if the import is done to modify the information of many boxes or files.

It is always recommended to do an import of one or few entries, before performing the actual import. This is done to make sure that mistakes in the Excel or CSV sheets can be caught before the actual import occurs.

This importation wizard simplifies the importation of boxes and files into the system. To import any other information, see the Importing Data topic.

** To make sure the importation goes smoothly, a check list was created so that you can verify if each step is performed correctly. This check list also mentions specific exceptions, so it is advisable to take a look at it prior to and during the importation (see the Check list 191 topic)

1 Click on **Inventory**->**Box and File Maintenance** from the *Main window*.
2 Click on **File**->**Import data with wizard**. A window appears.

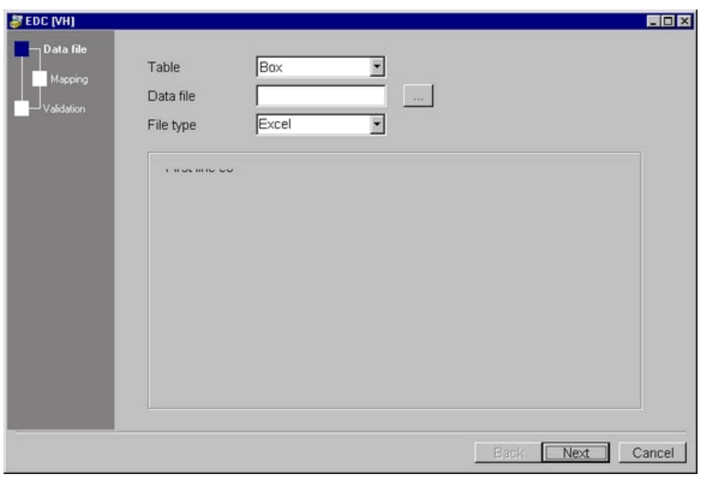


Table - Drop down list including these choices: Box and File. This indicates what type of item you want to import.
Data file - Click on the browse button to select a file. This file should include all the information you want to import.
File type - Drop down list including these choices: Excel and CSV (A file with Comma Separated Values).

First line contains headers - Check box that must be checked when the first line of the Excel spreadsheet or CSV file contains headers.

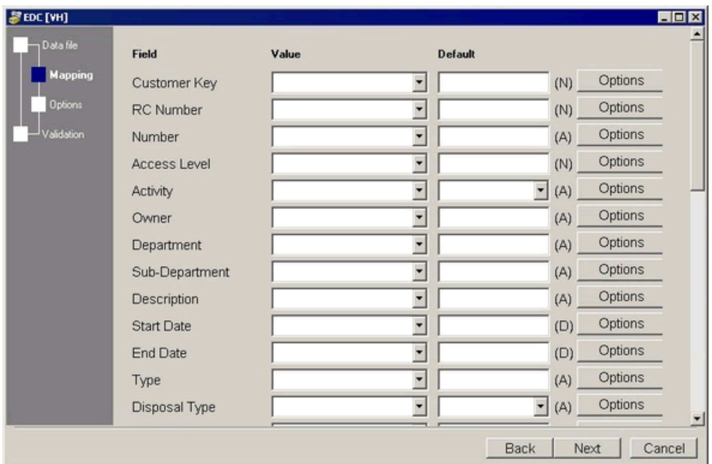
Separator - Field that is only visible when the CSV file type is chosen.
A separator is a character that divides the different information (it can be a comma, a period, an

apostrophe, etc.) For a complete list of separating characters, see the topic called List of separating characters 135. Make sure that the separator entered is the same one that is present in your data file.

Delimiter - Field that is only visible when the CSV file type is chosen.
A delimiter is the same thing as a separator, but the delimiter must always be different from the separator in each CSV file. For a complete list of delimiting characters, see the topic called List of separating characters 135.

EX: 'fee-001','DEMO-E','InTransit','general','general'
In this sequence of information, the separator is a comma(,) while the delimiter is an apostrophe (').

3 When the all options have been selected and the data file has been chosen, press on the **Next** button. A window appears.



Note: If you checked the *First line contains headers* checkbox during step **2**, the names of the columns (either in the excel or the csv file) will appear in the value drop-down list. If you haven't checked it, the values that were contained on the first line of your file will appear in the list.

4 Fill in the form:

- Associate fields to values by selecting a value in the drop-down list beside the field.

or

- Enter or select a default value in the empty field or the drop-down list. This value will be automatically imported in the field of the box or file module for all the items in the data file. *The default value should only be selected or entered if a **Value** has not been selected.*

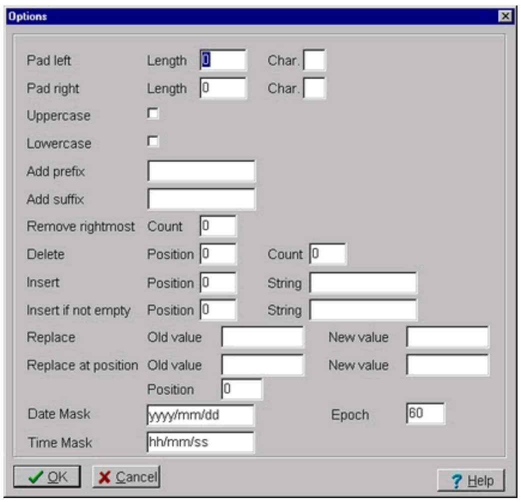
** The required fields for the importation are the following :

For boxes
Box number
Customer key
Activity
Department name
Sub-department name
Type
Volume
Location (only when the Activity in IN)

For files
File number
Box number or Location (only when the Activity in IN)
Customer key
Activity
Department name
Sub-department name
Type

These fields can either be set as default values or a value needs to be selected in the list, otherwise the wizard will give you an error message if one of these fields is missing.

- To modify the values in the data file or to specify something in particular for a field, press on the **Options** button. A window appears.



Pad left - The field's value will be padded to the left with char, for a total length of Length. If Length is smaller than the length of the field value, the field value will not change.

Length - This specifies the length of the value after adding a char.
Char - The character that will appear at the left of the value.

Ex: If a field's value is '6', after a Pad Left operation (with Length = 4 and Char = 0), it will become '0006'

Pad right - Similar to Pad Left, but the padding is added to the right. The field's value will be padded to the right with char, for a total length of Length. If Length is smaller than the length of the field value, the field value will not change.

Length - This specifies the length of the value after adding a char.
Char - The character that will appear at the right of the value.

Ex: If a field's value is '6', after a Pad Left operation (with Length = 4 and Char = 0), it will become '6000'

Uppercase - Boolean field that converts the field's value to upper case letters.
Ex: If a field's value is 'Hello!', after Uppercase, it will become 'HELLO!'

Lowercase - Boolean field that converts the field's value to lower case letters.
Ex: If a field's value is 'Hello!', after Lowercase, it will become 'hello!'

Add prefix - The value specified in this field will be added at the beginning of the field's value.
Ex: If a field's value is 'Smith', and 'Dr.' is added as a prefix, it will become 'Dr.Smith'

Add suffix - The value specified in this field will be added at the end of the field's value.
Ex: If a field's value is 'Dr. Smith', and ' Jr.' is added as a suffix, it will become 'Dr. Smith Jr.'

Remove rightmost - The 'count' characters will be deleted from the right side of the field's value.

Count - This specifies the number of characters to remove from the right.

Ex: If a field's value is 'Hi there', and the count value is 6, it will become 'Hi'.

Delete - The amount of characters specified in the *Count* field will be deleted from the field's value starting from the value specified in the *Position (*where the first character is considered at position 1.)

Position - This specifies where the deletion starts.
Count - This specifies the number of characters to delete.

Ex: If a field's value is 'IceCreamEater', and a delete modification is done (Position =4 and Count= 5), it will become 'IceEater'.

Insert - The value of *String* will be inserted in the field's value before the position indicated by *Position* (where the first character is considered at position 1.)

Position - This specifies where the values specified in the *String* field will be inserted.
String - This specifies the values inserted.

Ex: If a field's values are 'Fruits juice', after the modification (*Position* = 7 and *String* = '& Cream'), it will become 'Fruits & Cream juice'.

Insert if not empty - This option has the same behaviour as the insert conversion except it will only insert the specified character string if the imported data is not empty. If the imported data is only "spaces" it will be considered as empty. See the example for ***Insert***.

Position - This specifies where the values specified in the *String* field will be inserted.
String - This specifies the values inserted.

Replace - If the field's value is the same as the one specified in the *Old value* field, it will be replaced by the value of the *New value* field. If one of the field values contains a comma (,) character, then it needs to be enclosed in brackets ("").

Old value - This is the old value that the system will look for and replace with the new value.
New value - This is the new value that will replace the old value.

Ex: If the field's value is 'IN', after doing a Replace (Old value = IN and New value = Received), it becomes 'Received'.

Replace at position - This is the same thing as ***Replace***, but the behaviour is to replace the specified string only if it is present at the indicated position.

Old value - This is the old value that the system will look for and replace with the new value.
New value - This is the new value that will replace the old value.
Position - This is the position where the *Old value* is supposed to be found in order to be replaced.

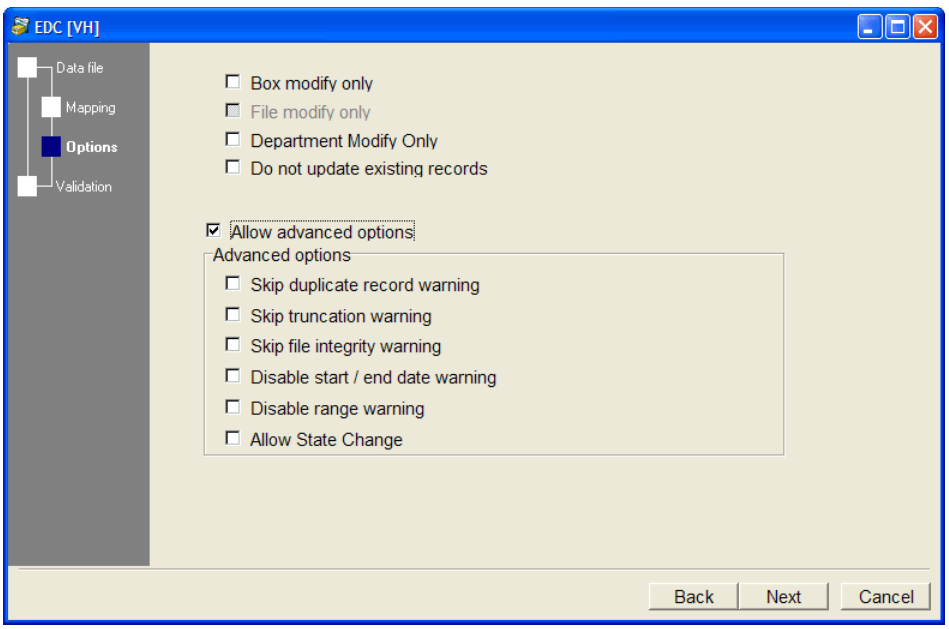
Ex: If a field value is 'ExampleOne' and another one is 'OneExample' and the Replace at position is performed with these settings: Old value = One, New value = Two, Position = 1. The field value 'ExampleOne' will remain the same, but 'OneExample' will changes to 'TwoExample'.

Date mask - This specifies the structure of the different dates in the data file. If a year is represented by two digits then an epoch must also be specified.
Ex: yyyy/mm/dd

Epoch - This specifies a two digit integer used to determine a date prefix, so that all two digits dates below the epoch value will be assigned a prefix 20, and all two digit dates above the epoch value will be assigned a prefix 19.
Ex: If the Epoch is set to 80 and the Date is set to 04/05/05, then the software will put 2004/05/05 for the date when doing the importation.

Time mask - This specifies the structure of the time in the data file.
Ex: hh/mm/ss

5 When all the fields have had a value or a column name assigned and all the options have been set, press on the **Next** button. A window appears.



Box modify only - Check box that prevents the addition of new boxes, only the update of the boxes' information already present in EDC will be done. This means that if a box contained in the data file is not already present in the software, the test and the final import will give an error message (ex: Box XYZ for customer DEMO not found, it can't be updated.)

File modify only - Check box that prevents the addition of new files, only the update of the files' information already present in EDC will be done. This means that if a file contained in the data file is not already present in the software, the test and the final import will give an error message (ex: File XYZ for customer DEMO not found, it can't be updated.)

Department modify only - Check box that prevents the addition of new departments, only already created departments should be included in the data file. This means that if a department contained in the data file is not already present in the software, the test and the final import will give an error message (ex: Department XYZ not found.)

Do not update existing records - Check box that prevents the update of existing records.

Allow advanced options - Checkbox that enables the use of the advanced options.

Advanced options

Skip duplicate record warning - When this checkbox is checked, the duplicate record warning will not be included in the error report. This verification is done to prevent the addition of duplicate records in EDC for the same customer.

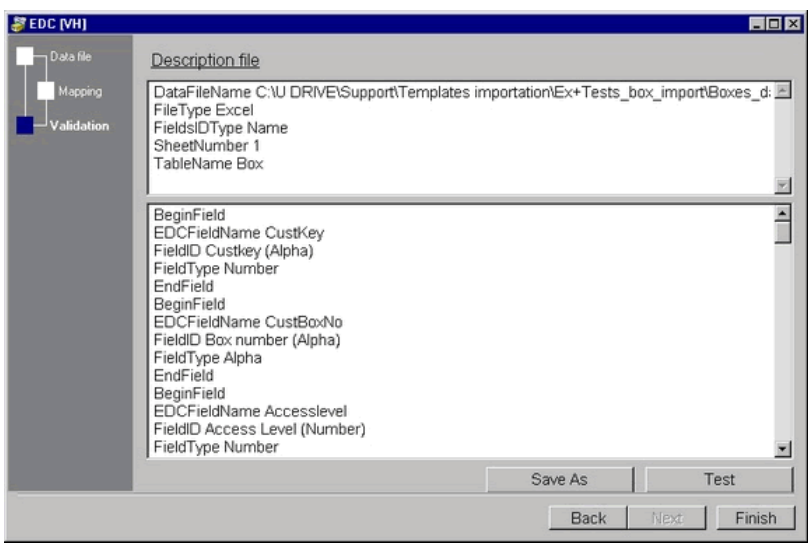
Skip truncation warning - When this checkbox is checked, the truncation warning will not be included in the error report. Normally the truncation message simply indicates that the data imported was too big for the field. The truncated information is simply added to the field and the complete information is included in the notes.

Disable start / end date warning - When this checkbox is checked, the start / end date warning will not be included in the error report. This verification is normally used to make sure the start date is before the end date.

Disable range warning - When this checkbox is checked, the range warning will not be included in the error report. This verification is normally used to make sure that the range interval is valid. A valid range is sequential, meaning that the first value (whether it be a letter or a number) is supposed to be before the second value in the sequence. *Ex:* A comes before Z, thus the range A124 to Z129 would be sequential while the range Z009 to A129 would not.

Allow State change - When this checkbox is checked, the software allows the update of the box or the file's activity, this should be done in exceptional situations. This verification is done so that the state of an item cannot be changed by importing a new activity.

6 When all the necessary options have been selected, click on the **Next** button. A window appears.



Test - The system will test the description file that has been created (according to the settings of the two previous windows). A report will appear, mentioning if the file contains any errors.

Save as - The system will prompt you to save the description file that has just been created.

7 Press on the **Test** button to make that the settings of the importation are correct. The import log of the test appears

Note: The test verifies only the first record of the data file, that is why the test report will only mention "1 record added/updated/skipped".

When reading the import log after a test or after the update, if a word or an expression is unfamiliar, please check the list of terms below for clarifications :

CustBoxNo - Box Number
CustFileNo - File number
FileOwner - File owner
BoxOwner - Box owner
MainDeptName - Department
SubDeptName - Sub department
BarCode - Alternate label
Description - Description
StartDate - Start Date
DocType - Type
UserField1- Field1
UserField2 - Field2
UserField3 - Field3
UserField4 - Field4
UserField5 - Field5
UserField6 - Field6
DestType - Disposal type
DestDate - Disposal date
RangeFrom - Range
RangeTo - Range
EntryDate - Entry Date
Volume - Volume
InVault - Vault
Activity - State
BoxDDNo - Box RC number
EndDate - End Date
SourceLoc - Source
Accesslevel - Access level
OldCustBoxNo - Old box number
OldCustFileNo - Old file number
Location - Location

Notes1- Notes
Notes2 - Secondary notes

8 When the testing and the mistake correction are complete, press on the **Finish** button. A confirmation message appears, press *Yes* if you want to continue. The system will then prompt you to give your password for confirmation. Enter your password and press **OK**.

9 The importation and/or update of the boxes or files will automatically be done.

6.12.8.3 Check List

This check list will help you make sure that you haven't forgotten anything important during your data importation. Please refer to the previous topic for a detailed step by step procedure 183.

Before the importation

☐ Take note that the disposal type and the disposal date cannot be imported via the import wizard, this will be available in a future version. This information can be imported via the more complex data importation.
☐ Make sure that all the values for the *Access Level* field range from 0 to 9.
☐ Make sure that the *Entry Date* field is not blank in the file, since the current date will be entered as default in the field.

****When importing or updating files :**
☐ Make sure that the state of the file corresponds to the state of the box it is imported in (ex: a file should not have the IN state if the box is in the IN TRANSIT state.)

During the importation

DATA FILE

☐ Make sure that you have chosen the right data file
☐ Make sure that you have entered the delimiter and the separator in the field (only if you are using CSV files). If this is not done, the entire line will appear in your drop-down list.

MAPPING

☐ Make sure the required fields are in the data file (excel or csv) or that a default value is entered or selected
☐ Make sure all the values are associated to the correct fields
☐ Make sure all the modifications that are specified in the **Options** are correct.

☐ Make sure that the following fields are not put as default :

Box Number (should only be used when doing File import, for files that will go in the same box)
(Box) RC number (should only be used when doing File import, for files that will go in the same box)
(Box)Old number
File Number
(File) RC Number
(File)Old number
Start Date
End Date
Entry Date
Bar code
Notes 1
Notes 2

*****When updating existing boxes :**
☐ Understand that if default values are selected or entered, the software will not update the existing information in this/these field(s).
☐ When updating boxes in the IN state, make sure not to leave an empty location in your data file because the software will automatically replace the existing location by a default holding location. Make sure to set a bogus default value like XXXXX for the location field.

OPTIONS

When updating existing boxes :
☐ Make sure that either the box modify only and/or the department modify only checkbox are selected in the options.

When updating existing files :
☐ Make sure that either the file modify only and/or the department modify only checkbox are selected in the options.

VALIDATION

☐ In the description file, when the *Customer Key* is taken from the data file :

BeginField
EDCFieldName CustKey
FieldID 2
FieldType ***Number***
EndField

*** Change the *Number* value for *Alpha*. ***

BeginField
EDCFieldName CustKey
FieldID 2
FieldType ***Alpha***
EndField

☐ Test the description file that was created.
☐ Verify the report created and change the necessary information (when the case arises).
☐ Test the description again (if there were errors to correct.)

WARNING

This operation ***cannot be undone***. Performing a back up of the database is highly recommended before going any further. This should be done in case boxes or files are added by mistake, or if the import is done to modify the information of many boxes or files.

It is always recommended to do an import of one or few entries, before performing the actual import. This is done to make sure that mistakes in the Excel or CSV sheets can be caught before the actual import occurs.

6.12.9 Importing images

This is used when many images need to be imported at the same time.

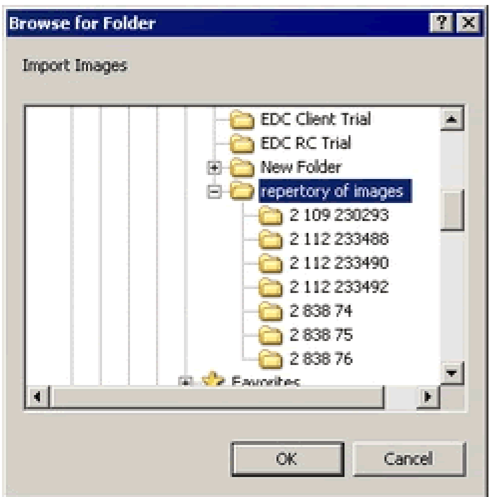
1 Create one or many folders named after the bar codes of the files you want to import images in. *Example:* one wants to import images for files A61 (bar code: 2 109 1223) and B62 (bar code: 2 109 1225) ; the folder for file A61 will be called "2 109 1223" while the folder for file B62

will be called "2 109 1225".

2 Put all the images you want to import in the appropriate folders. If you need to import many files at a time create a repertory where all the folders will be and select that repertory when it is time to import.

Note : One can only import images in files that are IN or IN TRANSIT. Not all image formats can be imported into EDC; the accepted formats are: .tiff, .tif, or .dcx for multi page formats and .bmp, .pcx, .png, .jpg for single page formats. The name of the images does not have to be specific.

3 Click on **Inventory**->**Box and File Maintenance** from the *Main window*.
4 Click on **File**->**Import Images**. A window appears (the window is specific to your computer.)



5 Select the repertory containing the folder(s) and press **OK**. The images will be imported in the software and an error log will be shown (either to confirm that the import is complete or to show the different errors.)
6 Repeat the operation if needed.

Note: See the topic Printing Imaging Separator Pages 106

6.12.10 Viewing the Replication log

1 Click on **Inventory**->**Box and File Maintenance** from the *Main window*.
2 Click on **File**->**Replicator Log**. The replication will be activated and the report will be generated.

If an error similar to the example below occurs, the IT personnel should be notified and encouraged to verify the replication settings in the system information module. If the error persists, contact your record center.

Ex: Could not connect to replicator at 127.0.0.1:11008.
Error EIdSocketError: Socket Error # 1006.
Connection refused.

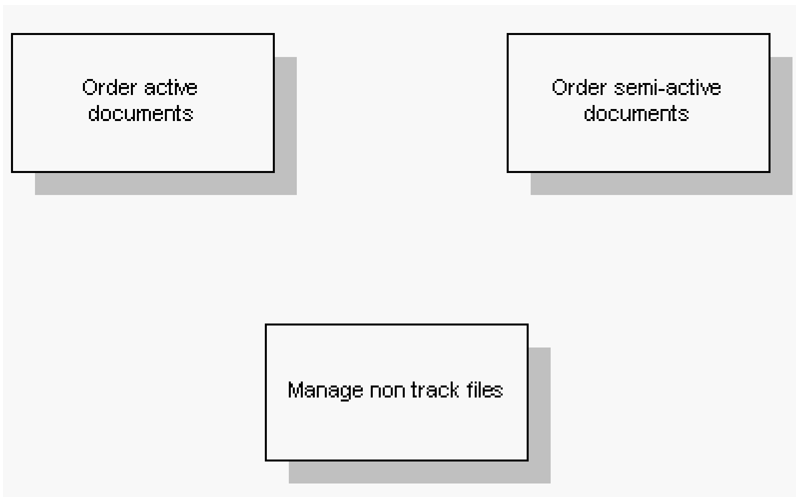
6.12.11 Viewing the date and time of the last replication

This information is useful when you want to make sure the data has been replicated with the record center. If the replication has not occurred in a while, you can force the replication through the On Demand Replication 51 in the *System Information* module.

1 Click on **Inventory**->**Box and File Maintenance** from the *Main window*.
2 Click on **File**->**View date and time of last replication**.
3 The information will be displayed in an information box.

7 Order processing

7.1 Outline (Orders)



7.2 Circulation

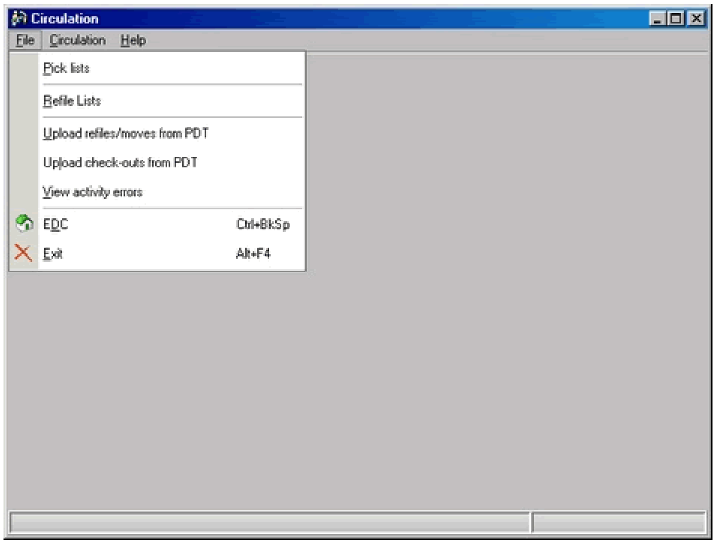
7.2.1 Overview (Circulation)

This module allows to manage the circulation of active documents. It also allows to know out dates, return dates or requester's name, for example.

Tasks

- Viewing or printing picking lists and refiling lists 195
- Using the PDT 195
- Checking out active documents 199 (or semi-active documents when not linked)
- Returning active documents 200 (or semi-active documents when not replicated)
- Performing a change of hands for documents that are out
- Tracking the movement of semi-active documents when the offsite record center does not use EDC 200

Module's window



7.2.2 Viewing or printing picking lists and refiling lists

1 Click on **Orders**->**Circulation** from the *Main window*.
2 Click on **File**->**Pick Lists|Refile Lists**. A window appears and asks to enter a date.
3 Enter the desired date and click on the **OK** button.

7.2.3 Using the PDT

Build to collect, display and communicate data, the PDT is used in most of the operations. Two PDT models are supported by ***EDC***: the PDT 3100 (by Symbol) and the PHL 2700 (by Opticon).

Designed to offer outstanding on-the-job scanning performance, the PDT is the essential tool for data processing with bar code reading. Connected to ***EDC***, the PDT significantly increases the capacity of an organization to update the inventory to real time and to even track the smallest move of each document.

Note : For each operation performed with a PDT, a personal bar code must be scanned with the device, in order to clearly identify the employee (see the *Fields* section of the *Employee* module).

Useful keys

- **CLR\F7** Return to current menu
- **0 + ENTER** Return to main menu
- **BK SP** Delete characters
- **SPACE/SP** Insert space between 2 characters

Selecting a menu, a sub- menu or a function (menu item)

Menu and sub-menus

The menus and the sub-menus are displayed vertically and are preceded by a number (ex : **2-Send results**, **3-Processing**, etc). To select a menu or a sub-menu, it is only necessary to press the key of the related number.

Main Menu

1 Receive
2 Send results
3 Processing
4 Utilities
5 Logout

Send and Processing menus
1 Refile/Move
2 Check out

Utilities menu
1 Info
2 Scan Count
3 Read bar code
4 Cradle/Cable
5 Min 2of5 Len (PHL2700 only)

Functions

Functions (menu items) are displayed on the same line in an abbreviated form and are also preceded by a number (**1Prv**, **2Nx**, etc). The functions are accessible when a menu and a sub-menu have been chosen and when an item is being processed. To activate a function, it is only necessary to press the key of the related number. In some situations, it can be necessary to press the **ENTER** key after the number.

7.2.3.1 Utilities menu

This menu is particularly useful to perform tests on the PDT, to correct mistakes and to set options.

Viewing the information of the PDT

The information about the PDT is organized in a certain way: the first line refers to the version of the PDT (ex: V 2.16); the second line gives the current date and the date the PDT was last updated;and the third line gives the amount of memory that the PDT contains.

1 Go in the *Utilities* menu (**4- Utilities**)
2 Go in the *Information* sub-menu (**1- Info**)

Defining the number of scans

The number of scans a PDT performs defines the margin of error; example, if a PDT verifies a bar code twice, then the margin of error will be smaller than if the PDT only verifies the bar code once. In brief, it means that the PDT will compare the two scans before accepting the item as the right one.

Note: The amount of time the PDT takes to scan will not change drastically, since the verification is very quick.

1 Go in the *Utilities* menu (**4- Utilities**)
2 Go in the *Scan count* sub-menu (**2-Scan count**)
3 Enter the number of scans (choose a number between 1 and 2).

4 The number of scans will automatically be changed.

Testing the bar code reading

This option is useful when testing the PDT to see if it can read the different bar codes.

1 Go in the *Utilities* menu (**4- Utilities**)
2 Go in the *Scan count* sub-menu (**3-Read bar code**)
3 Read the bar code and compare the bar code displayed on the screen with the bar code you have just scanned.

Selecting a mode of communication (only for PHL 2700-80 model)

This option is mainly used when the mode of communication needs to be changed often (if the facility has cables and cradles at its workstations) or for the initial set up of the PDT. Also, when the batteries are changed, the PHL is set for cable communication by default, so one needs to set this parameter, especially if the communication is mainly done with cradles.

1 Go in the *Utilities* menu (**4- Utilities**)
2 Go in the *Cradle/Cable* menu (**4-Cradle/Cable**)
3 Press **(1)** and **Enter** to choose the communication by Cradle and **(2)** and **Enter** to choose the communication by Cable.

Note: The default is always set to **Cradle** communication.

Setting the bar code symbology

This option is only useful when the record center has alternate labels with the '2 of 5' bar code symbology, by default, EDC uses the '3 of 9' symbology. This enables the user to select the length of the bar codes used. This option is only available for the PHL2700 model.

1 Go in the *Utilities* menu (**4- Utilities**)
2 Go in the *Min 2of5 length* menu (**5-Min 2of5 length**)
3 The default used for the length of the bar code is 6. To change that length, enter the new value (*Ex:* 7) and press **Enter**. The PDT goes back to the main menu.

7.2.3.2 Setting up the system for PDT use

1 Create codes for end file users (Recipients) by adding them into the Recipients 213 module and printing their labels 215. These users will be receiving the files ordered in the Order 201 module.
2 Ask a supervisor to print a bar code 44 for each authorized user that will have access to a PDT. The user will have to scan this barcode in order to log in to the PDT.
3 Create 149 and print labels 150 for Internal Locations 147 (if not already done). These labels will be associated to internal sites or shelving units where files are stored when unused by recipients (returned to location).
4 It is recommended to print out these bar codes and place them in a document (ex: binder with multiple sheets) that can be updated when adding new users or end recipients.
5 Create corporate *Department* bar codes via the SQL Reports 135 module if needed.

7.2.3.3 Delivering a file from an Internal location

On PDT:
1 Log into the PDT
(This can be done by scanning your authorized user bar code 44 provided by your supervisor)
2 Press **3**, to access the **Processing** menu. Press **2** to use the CHECKOUT function.
3 Scan the bar code of the recipient (from the list or binder you previously created)
4 Proceed to scan the barcodes of the items that will be given to that recipient. Once this operation is complete, exit this function by pressing **0** and **Enter** to get to the main menu.
5 Link the PDT to the computer via the cable or cradle.

In EDC CLIENT :
6 Click on **Orders**->**Circulation** from the *Main window*.
7 Click on **File->Upload checkouts from PDT**
8 A window will appear saying : Waiting for PDT.

On PDT:
9 Press or select **2 Send results** from the main menu and select **2** CHECKOUT.
10 Once completed, proceed to log out of PDT by pressing **5 Log Out** from the main menu.

Note: When information is transferred from the PDT to the software, the software should always be waiting for a reply from the PDT first and not the opposite. If a communication error like this occurs, simply press ESC on the PDT and try to send the results again.

7.2.3.4 Returning files to a repository

On PDT:
1 Log into the PDT
(This can be done by scanning your authorized user bar code 44 provided by your supervisor)
2 Press **3**, to access the **Processing** menu. Press **1** to use the REFILE / MOVE function.
3 Select the type of item to return : **1** to return a *Box* and **2** to return a *File*. Since files will probably be returned more often, we will use a file return for this example. Press **2** for *File*.
4 Enter the type of location the file is returned to by pressing **1** for a *Box* or **2** for a *Location*.
5 Proceed to scan and verify the barcode of the location (box or location). Once this operation is complete, exit this function by pressing **F7** or **CLR** to get to the refile\move menu.
6 Once all the items have been scanned, return to the main menu by pressing on **0** and **Enter**.
7 Link the PDT to the computer via the cable or cradle.

In EDC CLIENT :
8 Click on **Orders**->**Circulation** from the *Main window*.
9 Click on **File->Upload refiles / moves from PDT**
10 A window will appear saying : Waiting for PDT.

On PDT:
11 Press or select **2 Send results** from the main menu and select **2** CHECKOUT.
12 Once completed, proceed to log out of PDT by pressing **5 Log Out** from the main menu.

Note: When information is transferred from the PDT to the software, the software should always be waiting for a reply from the PDT first and not the opposite. If a communication error like this occurs, simply press ESC on the PDT and try to send the results again.

7.2.3.5 Performing an inventory of files located with recipients

Please take note that this section follows the same procedure as delivering a file from an internal location 198.

On PDT:
1 Log into the PDT
(This can be done by scanning your authorized user bar code 44 provided by your supervisor)
2 Press **3**, to access the **Processing** menu. Press **2** to use the CHECKOUT function.
3 Scan the bar code of the recipient (from the list or binder you previously created)
4 Proceed to scan the barcodes of the items that will be given to that recipient. Once this operation is complete, exit this function by pressing **0** and **Enter** to get to the main menu.
5 Link the PDT to the computer via the cable or cradle.

In EDC CLIENT :
6 Click on **Orders**->**Circulation** from the *Main window*.
7 Click on **File->Upload checkouts from PDT**
8 A window will appear saying : Waiting for PDT.

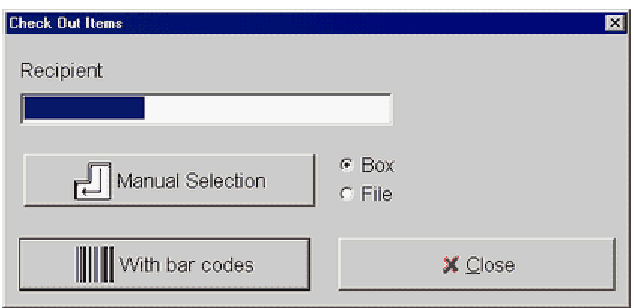
On PDT:
9 Press or select **2 Send results** from the main menu and select **2** CHECKOUT.
10 Once completed, proceed to log out of PDT by pressing **5 Log Out** from the main menu.

Note: When information is transferred from the PDT to the software, the software should always be waiting for a reply from the PDT first and not the opposite. If a communication error like this occurs, simply press ESC on the PDT and try to send the results again.

7.2.4 Checking out active documents (or semi-active documents when not linked)

See also the Using the PDT 195 chapter.

1 Click on **Orders**->**Circulation** from the *Main window*.
2 Click on **Circulation**->**Check Out Items**. A window appears.



3 Enter the recipient.
4 Check off the appropriate box whether files or boxes have to be checked out.
5 Perform one of the following actions :
- To use a bar code reader, click on the **With bar codes** button and scan the items (or manually enter the number located under the bar code of the record label and click on the **OK** button). Press the **Esc** button when finished.
- To manually select items, click on the **Manual Selection** button.

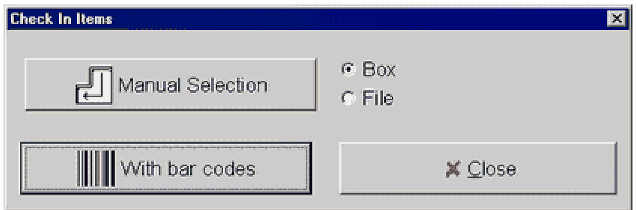
6 Click on the **Add** button .
7 Enter an item number to indicate where to start on the list and click on the **OK** button .
8 Select the desired boxes or files from the list (they will appear underlined).
9 Click on the **OK** button.
10 Add more articles by repeating steps **6**, **7** and **8**.
11 Delete items from the list by selecting them and clicking on the **Delete** button.
12 Search for items by clicking on the **Search** button and proceeding as described 129 in the "Searching for boxes or files " rubric.
13 Click on the **OK** button to terminate the procedure.

Note : The software automatically updates the state and history of the concerned documents.

7.2.5 Returning active documents (or semi-active documents when not replicated)

See also the Using the PDT 195 chapter.

1 Click on **Orders**->**Circulation** from the *Main window*.
2 Click on **Circulation**->**Check In Items**. A window appears.



3 Check off the appropriate box whether files or boxes have to be returned.
4 Perform one of the following actions :
- To use a bar code reader, click on the **With bar codes** button and scan the items (or manually enter the number located under the bar code of the record label and click on the **OK** button). Press the **Esc** button when finished.
- To manually select items, click on the **Manual Selection** button.

5 Click on the **Add** button .
6 Enter an item number to indicate where to start on the list and click on the **OK** button .
7 Select the desired boxes or files from the list (they will appear underlined).
8 Click on the **OK** button.
9 Add more articles by repeating steps **5**, **6** and **7**.
10 Delete items from the list by selecting them and clicking on the **Delete** button.
11 Search for items by clicking on the **Search** button and proceed as described 129 in the "Searching for boxes or files " rubric.
12 Click on the **OK** button to terminate the procedure.

Note : The software automatically updates the state and history of the concerned documents.

7.2.6 Tracking the movement of semi-active documents stored at a record center that does not use EDC

EDC can be used to maintain control over documents stored at a record center that does not use ***EDC***. In this case ***EDC*** is not linked (electronically linked) with the said record center.

The procedure used to track these documents is simple : boxes or files just need to be entered as "IN TRANSIT" (making them semi-active documents) in the *Box* 86 and *File* 86 modules, to become available by checking them into the off-site record center through the *Circulation* 194 module (this will change their state from "IN TRANSIT" to "IN") and to be ordered as if they were active documents (still through the *Circulation* module). In addition, the physical location of these documents within the off-site record center can also be specified through the *Location* 88 field of the *Box* module.

Note: The software automatically updates the state and history of the concerned semi-active documents.

7.3 Order

7.3.1 Overview (Order)

This module allows to create, delete and edit orders and to consult the information related to the previous orders, including their states, delivery addresses, delivery dates and persons who requested the items. Ordered items are displayed one at a time.

Available report

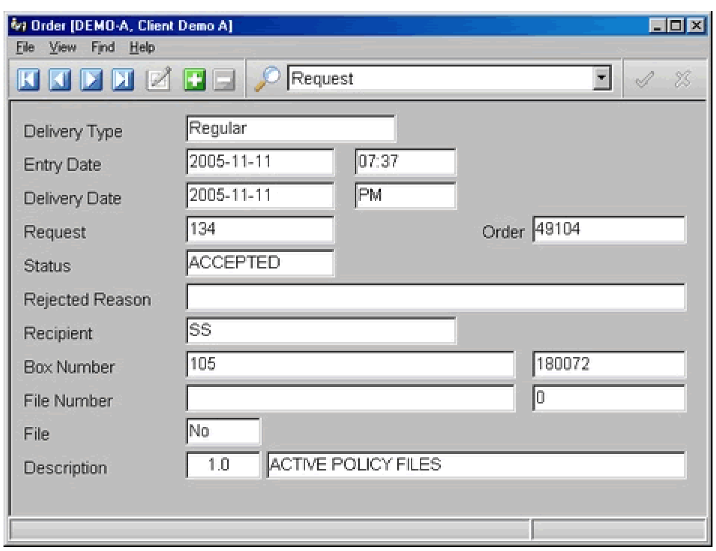
- list of all orders or rejected orders

Fields 201 (see the next section)

Tasks

- Ordering a semi-active box or file 202;
- Ordering a semi-active file that has not been inventoried 203
- Returning documents to the offsite record center 204
- Adding other services to an order 205
- Adding a box or a file search to an order 207
- Viewing the delivery address of the selected order request 211
- Viewing or printing report for all orders or rejected ones 211

Module's window



7.3.2 Fields (Order)

Delivery Type
Method and delay for the delivery. Delivery details are set by the off-site record center.

Entry Date

Date and time of the order.

Delivery Date
Indicates the date when the order was delivered. This field will remain empty until the order is accepted.

Request
This is a unique number generated by the system to identify an article within an order.

Order
The off-site record center order number.

State
Indicates if the order has been accepted or not. When it is rejected, the reason appears in the following field.

Rejected Reason
Reason of a refused order. A rejected order simply means that the order could not be processed. For example, an order will be rejected if the box is out.

Recipient
Name of the person to whom the item will be delivered.

Mail Code
Recipient's mail code.

Box Number
Number of the ordered box. The second field displays the number given to the box by the ***EDC*** software (RC number).

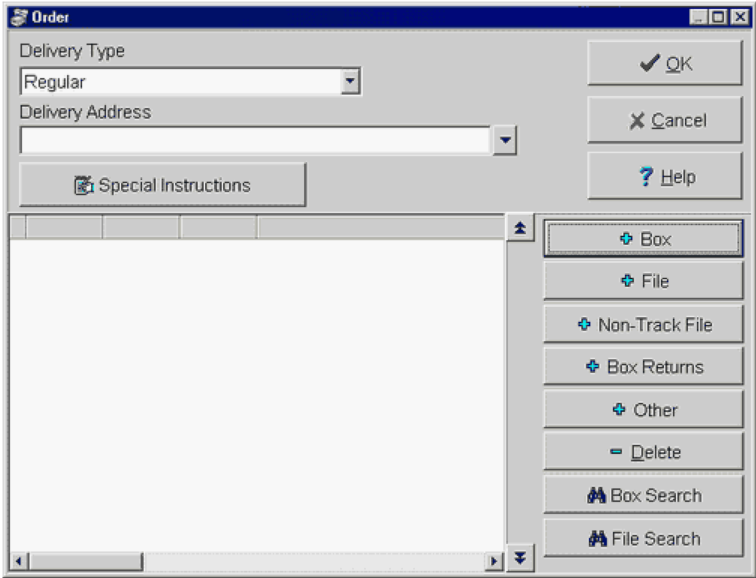
File Number
Number of the ordered file. The second field displays the number given to the file by the ***EDC*** software (RC number).

File
Indicates if the item is a file. This field is useful to distinguish non track files from inventoried files. When this field's value is "Yes", and there is no value in the *File Number* field, the item in question is then a non track file (since inventoried files have an RC number).

Description
Quantity and description of the ordered item.

7.3.3 Ordering a semi-active box or file

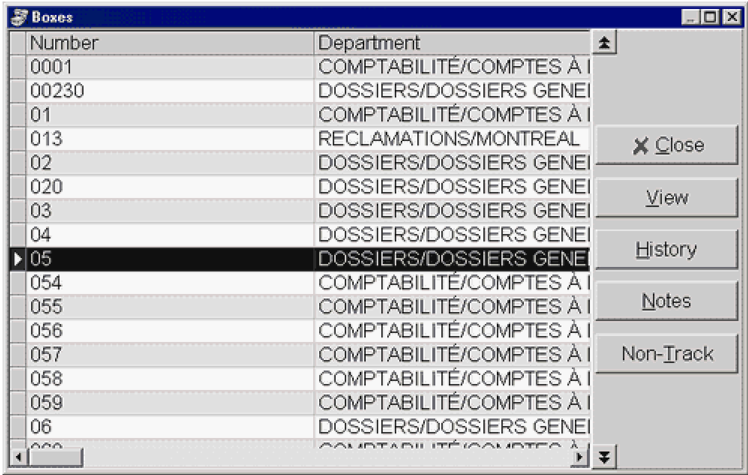
1. Click on **Orders**->**Order** from the *Main window*.
2. Click on **File**->**Create Order**. A window appears.



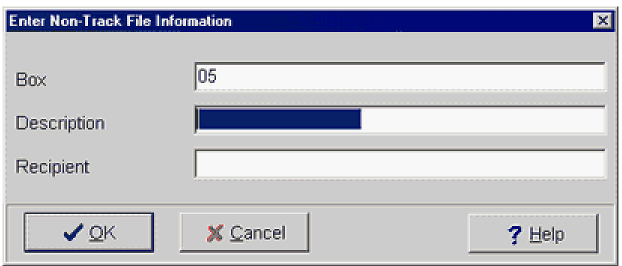
3 Specify the delivery type by using the drop-down button of the *Delivery type* field.
4 Specify the delivery address by using the drop-down button of the *Delivery Address* field.
5 Add special instructions to the order by clicking on the **Special Instructions** button.
6 Click on the **Box** button or on the **File** button to add a box or a file to the order.
7 Enter a description or an item number to indicate where to start on the list that will follow. Enter the recipient. Press **OK** and select the desired articles from the list.
8 Press **OK**.
9 Add more articles by repeating steps **6**, **7** and **8**.
10 Delete items from the list by selecting them and clicking on the **Delete** button.
11 Buy empty filing boxes from the off-site record center by clicking on the **Box Sale** button.
12 Press **OK** to send the order.
13 A dialog box appears displaying the transmission progress of the current order. Once the order is accepted, its items are displayed in the *Order* module. A message indicates if an article is rejected from the order. The reason of the rejected articles can be viewed in the *Order* module.

7.3.4 Ordering a semi-active file that has not been inventoried

1 Click on **Orders**->**Order** from the *Main window*.
2 Click on **File**->**Create Order**. The order's window reappears as in the previous rubric.
3 Specify the delivery type by pressing the choice button.
4 Specify the delivery address by using the drop-down button.
5 Add special instructions to the order by clicking on the **Special Instructions** button.
6 Click on the **Non Track File** button. A window appears and allows to choose a box number.
7 Enter the box number from which the non track file will be taken in order to indicate where to start on the box selection list. A window opens on the screen.



8 Select a box and press the **Non Track** button. Another window appears.



9 Enter the information for the non track file and click on the **OK** button.
10 Add more non track files by repeating steps **8** and **9**.
11 Click on the **Close** button.
12 Delete items from the list by selecting them and clicking on the **Delete** button.
13 Buy empty filing boxes from the off-site record center by clicking on the **Box Sale** button.
14 Click on the **OK** button to send the order.
15 A dialog box appears displaying the transmission progress of the current order. Once the order is accepted, its items are displayed in the *Order* module. A message indicates if an article is rejected from the order. The reason of the rejected articles can be viewed in the *Order* module.

7.3.5 Returning documents to the off-site record center

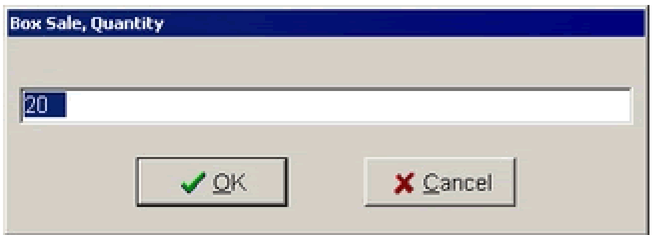
1 Click on **Orders**->**Order** from the *Main window*.
2 Click on **File**->**Create Order**.
3 Specify the delivery type by pressing the drop-down button.
4 Specify the delivery address by using the choice button.
5 Add special instructions to the order by clicking on the **Special Instructions** button.
6 Click on the **Box Returns** button and indicate the quantity to be picked up (the boxes must be in the IN TRANSIT or the OUT state).
7 Press **OK**.
8 A dialog box appears displaying the transmission progress of the current order. Once the order is accepted, it is displayed in the *Order* module. A message indicates when an article is rejected from the order. The reason of the rejected articles can be viewed in the *Order* module.

Note : When possible, boxes should be returned with regular orders. The boxes will be picked up at the next delivery. This will minimize the transport fees associated to the returns.

7.3.6 Adding other services to an order

Adding a cardboard box sale

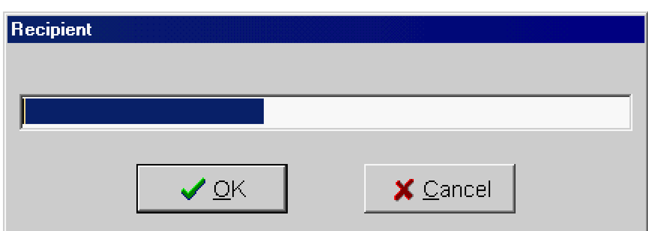
1. Click on **Orders**->**Order** from the *Main window*.
2. Click on **File**->**Create Order**.
3. Specify the delivery type by pressing the drop-down button.
4. Specify the delivery address by using the choice button.
5. Add special instructions to the order by clicking on the **Special Instructions** button.
6. To add a cardboard box sale, press on the **Other** button.
7. Select the *Box sale* item from the menu. A window appears.



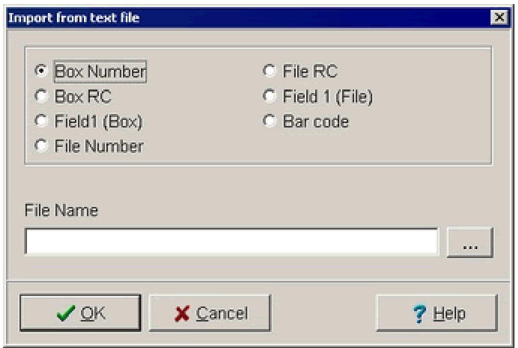
8. Enter the desired quantity of items and press **OK**. The sale of boxes will automatically be added to the order.

Import items from a text file

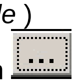
1. Click on **Orders**->**Order** from the *Main window*.
2. Click on **File**->**Create Order**.
3. Specify the delivery type by pressing the drop-down button.
4. Specify the delivery address by using the choice button.
5. Add special instructions to the order by clicking on the **Special Instructions** button.
6. To add a cardboard box sale, press on the **Other** button.
7. Select the *Import from text file* item from the menu. A window appears.



8. Enter a recipient and press **OK**. A window appears.

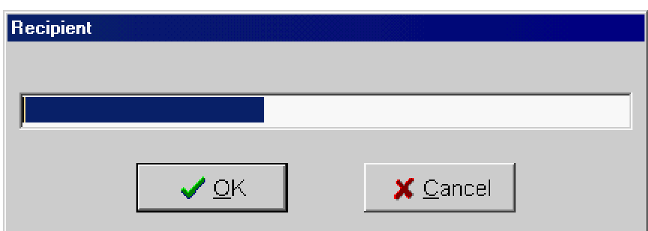


9 Select the field by which you import *(Box number* | *Box RC* | *Field1(Box)* | *File number* | *File RC* | *Field 1 (File)* | *Bar code)*

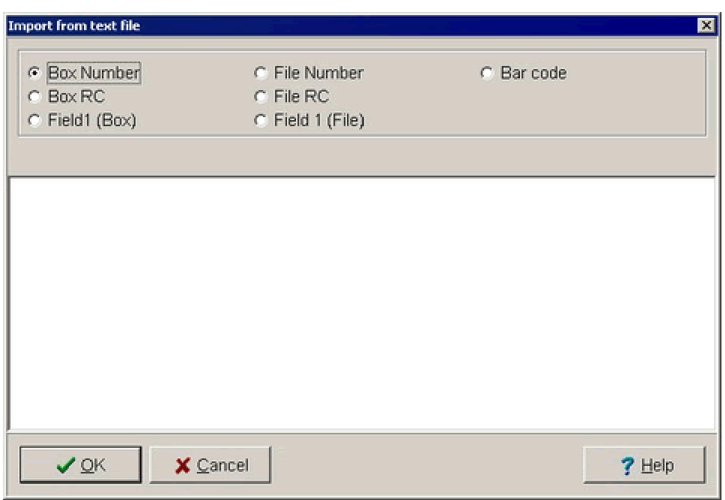
10 Press on the browse button  and select the desired text file. Press **OK**.
11 The boxes|files will automatically be added to the order.

Add items from a list

1 Click on **Orders**->**Order** from the *Main window*.
2 Click on **File**->**Create Order**.
3 Specify the delivery type by pressing the drop-down button.
4 Specify the delivery address by using the choice button.
5 Add special instructions to the order by clicking on the **Special Instructions** button.
6 To add a cardboard box sale, press on the **Other** button.
7 Select the *Add to Order from list* item from the menu. A window appears.



8 Enter a recipient and press **OK**. A window appears.



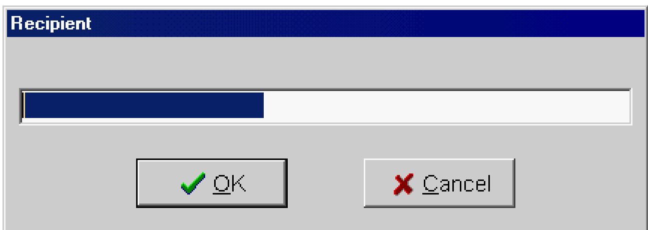
9 Select the field by which you import *(Box number* | *Box RC* | *Field1(Box)* | *File number* | *File RC* | *Field 1 (File)* | *Bar code)*
10 Enter the desired information in the empty space and press **OK**.
11 The boxes|files will automatically be added to the order.

7.3.7 Adding a box or a file search to an order

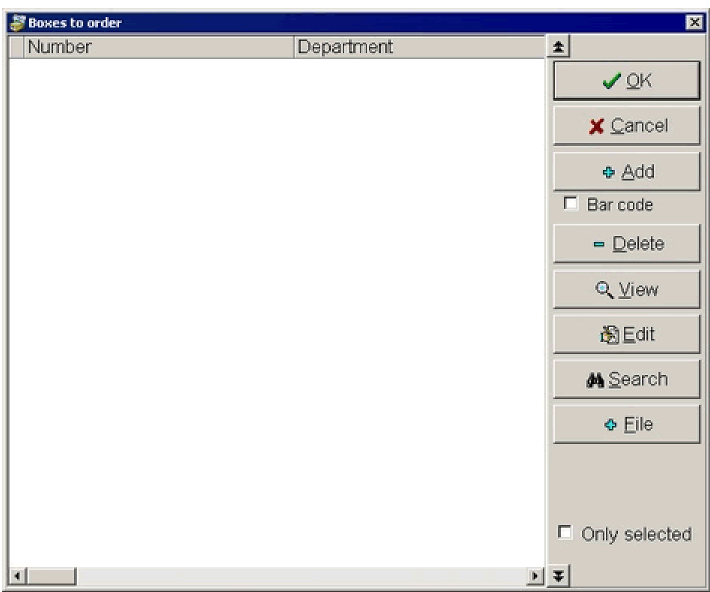
Adding a box search

The box and file search, contrary to a simple search, adds items to the order.

1 Click on **Orders**->**Order** from the *Main window*.
2 Click on **File**->**Create Order**.
3 Specify the delivery type by pressing the drop-down button.
4 Specify the delivery address by using the choice button.
5 Add special instructions to the order by clicking on the **Special Instructions** button.
6 To add a cardboard box sale, press on the **Box Search** button. A window appears.



7 Enter the recipient and press **OK**. When the customer is billed by charge back a window appears.
8 When necessary, enter a charge back code and press **OK**. A window appears.



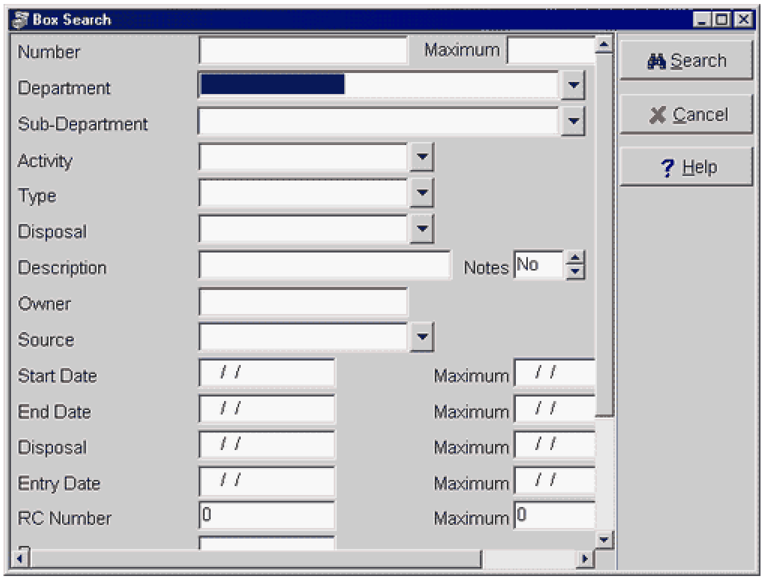
9 Perform one of the following operations :

To manually add boxes, click on the **Add** button and enter a number in the window that is displayed. The list of the boxes or files for the customer appears. Select the desired items and

press **OK**. The items are added to the selection and are displayed in the window opened in **3**.

Note : By selecting a box in the ones that are added to the order and by clicking on the **File** button, it is possible to enter a description for a file contained in that box; this will indicate to the system not to order the entire box but only the file.

- To add items by performing a search, click on the **Search** button. A window appears.



Enter one or more search criteria and click on the **Search** button. All the boxes that correspond to the entered criteria are automatically added to the selection. They will appear in the window opened in **3**.

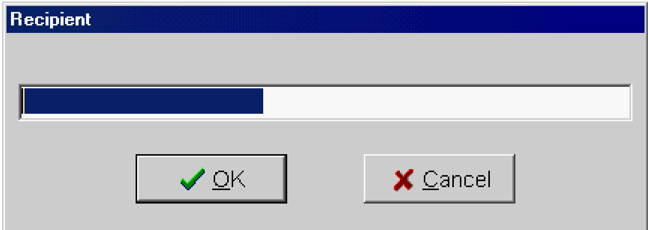
- To remove an item from the selection, select it and click on the **Delete** button.
- To include only certain boxes from the list: select the boxes and files you want to add and check the field called "Only Selected".

10 Click on the **Accept** button to confirm the addition of all the items to the order. The available boxes and files are added to the order and a message appears for each rejected item, indicating the reason of the reject (item not IN, insufficient access rights of the user, etc.).

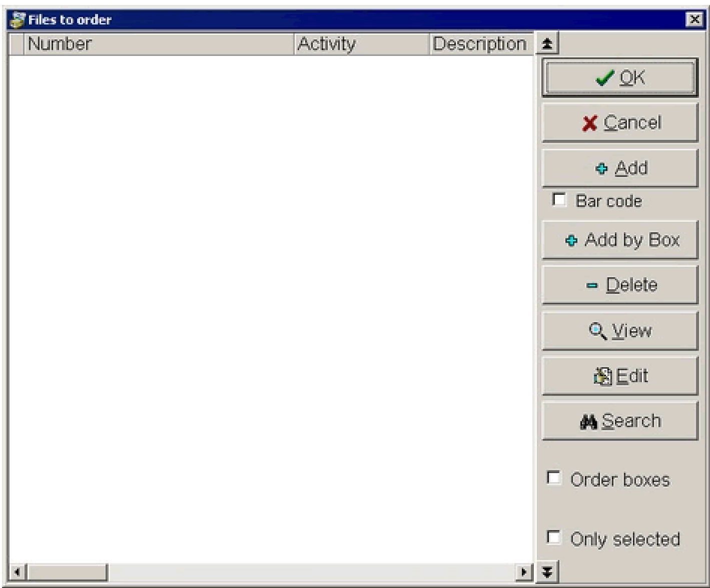
*Adding a file search

The file search, contrary to a simple search, adds items to the order.

1 Click on **Orders**->**Order** from the *Main window*.
2 Click on **File**->**Create Order**.
3 Specify the delivery type by pressing the drop-down button.
4 Specify the delivery address by using the choice button.
5 Add special instructions to the order by clicking on the **Special Instructions** button.
6 To add a cardboard box sale, press on the **File Search** button. A window appears.



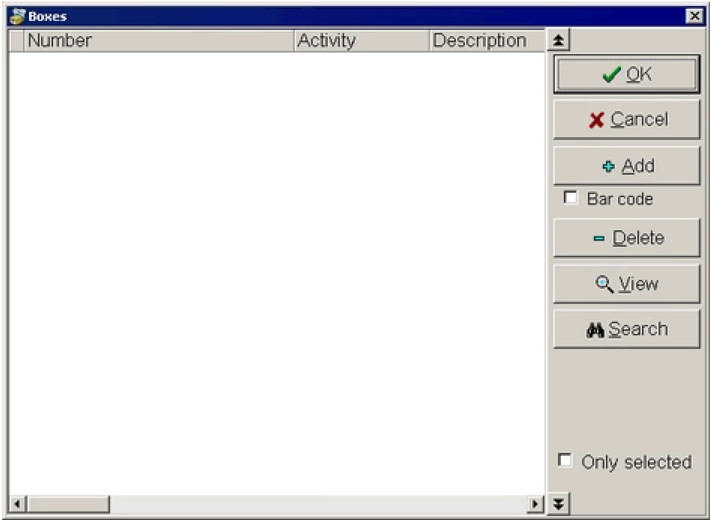
7 Enter the recipient and press **OK**. When the customer is billed by charge back a window appears.
8 When necessary, enter a charge back code and press **OK**. A window appears.



9 Perform one of the following operations :

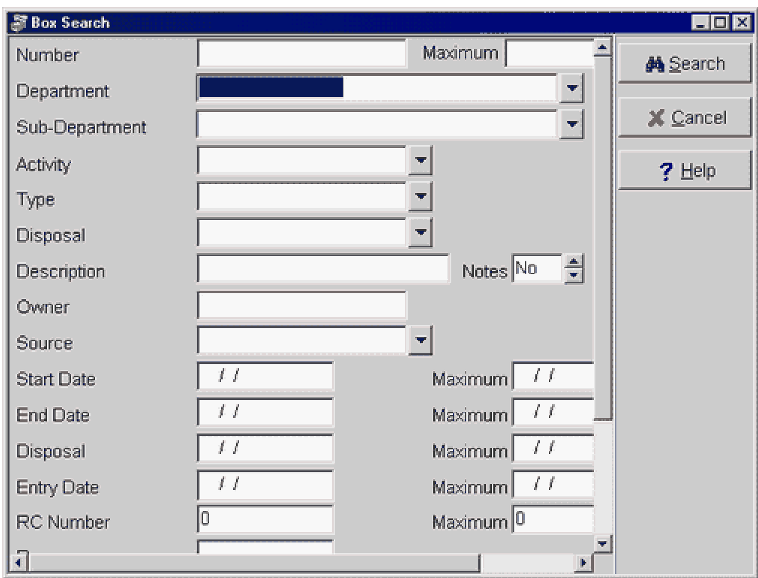
- To manually add files, click on the **Add** button and enter a number or a description in the window that is displayed. The list of the customer's files appears. Select the desired items and press **OK**. The items are added to the selection and are displayed in the window opened in **3**.

- To add many files from the same box, click on the **Add by Box** button. A window appears.



Click on the **Add** button, and enter a box number. The list of the customer's boxes appears. Select one or many boxes (they will appear highlighted) and press **OK**. Press **OK** in the *Boxes* window when all the boxes where added. All the files from the boxes selected appear in the *Files to order* window.

- To add items by performing a search, click on the **Search** button. A window appears.



Enter one or more search criteria and click on the **Search** button. All the boxes and files that correspond to the entered criteria are automatically added to the selection. They will appear in the window opened in **3**.

- To remove an item from the selection, select it and click on the **Delete** button.
- To include only certain boxes or files from the list: select the boxes and files you want to add and check the field called "Only Selected".
- To add only the boxes to the order instead of all the files, check the field called "Order boxes".

10 Click on the **Accept** button to confirm the addition of all the items to the order. The available files are added to the order and a message appears for each rejected item, indicating the

reason of the reject (item not IN, insufficient access rights of the user, etc.).

7.3.8 Viewing the delivery address of the selected order request

The address of the ordered item can be displayed. This address has been entered in the system by the off-site record center.

1 Click on **Orders**->**Order** from the *Main window*.
2 Select the desired item 20.
3 Click on **View**->**Delivery Address**.

7.3.9 Viewing or printing report for all orders or rejected ones

1 Click on **Orders**->**Order** from the *Main window*.
2 Click on **File**->**View Report|Print Report**->**All|Rejected**.

7.4 Non Track File

7.4.1 Overview (Non Track File)

The files that are not inventoried can be ordered like any other ones and from this moment they are tracked in a limited way. This module allows to consult information on the ordered non track files.

Available reports

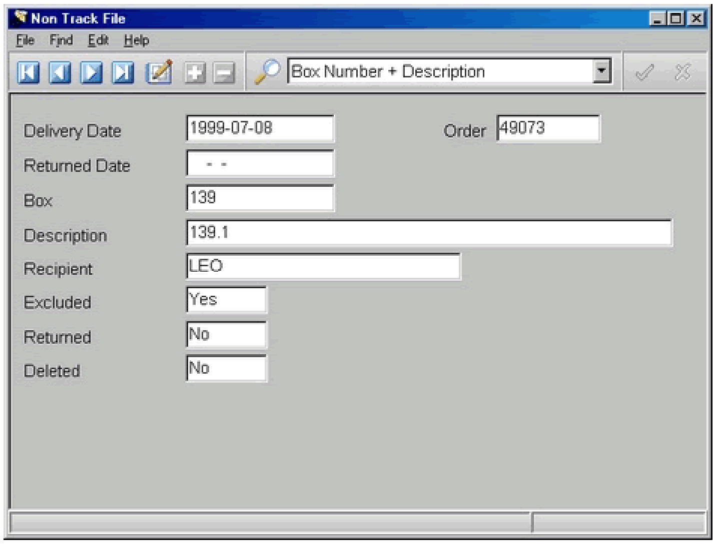
- list of all non track files
- deletion notice

Fields 212 (see the next section)

Tasks

- Viewing or printing the report of non track files 212
- Printing a deletion notice 213
- Printing a lost file notice 213

Module's window



7.4.2 Fields (Non Track File)

All fields in this module are read-only, except for the *Deleted* field.

Delivery Date
Indicates the date at which the non track file was delivered to the organization.

Order
Indicates the off-site record center's order number.

Returned Date
Indicates the date at which the non track file was returned to the off-site record center.

Box
Box number from which the non track file has been taken.

Description
Description of the non track file.

Recipient
Indicates the person who has checked out the non track file.

Excluded
Indicates if a non track file has been excluded from an order and has thus not been sent to the organization. A requested file that cannot be found will be marked as excluded.

Returned
Indicates if the non track file has been returned to the off-site record center.

Deleted
Indicates if the non track file has been withdrawn from the off-site record center inventory and will not be returned to it. The content of this field is automatically changed to "Yes" when a deletion notice is printed for a non track file. The content of this field can be manually edited.

7.4.3 Viewing or printing reports about non track files

Report of all non track files

1 Click on **Orders**->**Non Track File** from the *Main window*.
2 Click on **File**->**View Report|Print Report**->**Non track files**
3 The report will automatically be printed or previewed.

Report of non track files out

1 Click on **Orders**->**Non Track File** from the *Main window*.
2 Click on **File**->**View Report|Print Report**->**Files out**
3 The report will automatically be printed or previewed.

7.4.4 Printing a deletion notice

This procedure is used when a non track file must be deleted at the record center. The content of the *Deleted* 212 field is automatically changed to "Yes" when printing a deletion notice.

The message is usually as follows : "This file is not returning to the record center. Please replace the file's "out card" with this notice." The previous text can be modified in the *Customer Information* module (consult the Editing the deletion notice template 60 topic for more information.)

1 Click on **Orders**->**Non Track File** from the *Main window*.
2 Click on **File**->**Print Deletion Notice**
3 The notice will automatically be printed.
4 Proceed to send this notice to the record center at the next box or file delivery\pick up.

7.4.5 Printing a lost file notice

This procedure is used when a non track file will cannot be found at the off-site record center and when its out card must be replaced by the following notice.

The message is usually as follows : "This is to inform you that all efforts by the Record Center to retrieve the document indicated below have failed. It is now considered lost and unavailable for Recall." The previous text can be modified in the *Customer Information* module (consult the Editing the lost file notice template 61 topic for more information.)

1 Click on **Orders**->**Non Track File** from the *Main window*.
2 Click on **File**->**Print Lost File Notice**
3 The notice will automatically be printed.
4 Return the lost file notice to the record center 204 by including it on a return.

7.5 Recipients

7.5.1 Overview (Recipients)

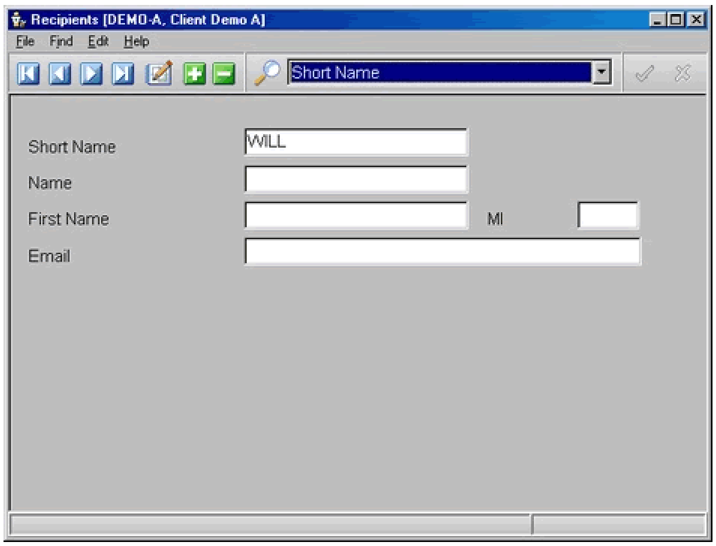
This module is used to facilitate the tracking of recipients and to allow e-mail information to be associated to a recipient in order to e-mail the out items memo.

Fields 214 (see the next section)

Tasks

- Printing a recipient label 215
- Editing a recipient 215
- Adding a recipient 215
- Deleting a recipient 215
- Scanning for new recipients 215
- Renaming a recipient 216

Module's window



7.5.2 Fields (Recipients)

Short Name
Read-only field when the recipient is already present in the module.
Alphanumerical field that cannot contain more than 20 characters.
The short name is used to select a recipient faster.

Name
Alphanumerical field that cannot contain more than 20 characters.
The name is used for tracking purposes.

First Name
Alphanumerical field that cannot contain more than 20 characters.
The first name is used for tracking purposes.

MI
Alphanumerical field that cannot contain more than 2 characters.
The middle initials are used for tracking purposes.

Email
Alphanumerical field that cannot contain more than 80 characters.
This field is used to allow e-mail information to be associated to a recipient in order to e-mail the out items memo.

7.5.3 Printing a recipient label

Printing a recipient label is used so that the PDT can scan the recipient's label (for tracking purposes.)

Before printing a recipient, search for the correct recipient (see the topic Performing a search 20). Once the correct recipient is displayed, follow these steps :

1. Click on **Orders**->**Recipients** from the *Main window*.
2. Click on **File**->**Print Recipient Label.**
3. The thermal label for the displayed recipient will be printed.

7.5.4 Editing a recipient

Before editing a recipient, search for the correct recipient (see the topic Performing a search 20). Once the correct recipient is displayed, follow these steps :

1. Click on **Orders**->**Recipients** from the *Main window*.
2. Click on **Edit->Edit**
3. Change the value in the wanted fields. Click on the **Accept** button when the modifications are done.

7.5.5 Adding a recipient

1. Click on **Orders**->**Recipients** from the *Main window*.
2. Click on **Edit->Add**
3. Enter the values in the different fields 214. Click on the **Accept** button when the relevant information has been entered.

7.5.6 Deleting a recipient

Before deleting a recipient, search for the correct recipient (see the topic Performing a search 20). Once the correct recipient is displayed, follow these steps :

1. Click on **Orders**->**Recipients** from the *Main window*.
2. Click on **Edit->Delete**
3. A confirmation message appears, press *Yes* to continue, *No* or *Cancel* to abort the operation. The displayed recipient will be deleted, if *Yes* was pressed.

7.5.7 Scanning for new recipients

Scanning for new recipients adds all the recipients that are not already existent, to the module. A new recipient can be added via the following operations :

Circulation module : Check Out, Change of hands
Order module : Add box, Add file
PDT : Checkout / Change of hands
Active web : Order
RC web : Order

1. Click on **Orders**->**Recipients** from the *Main window*.
2. Click on **Edit->Scan for new recipients**
3. If any new recipient was added during one of the operations specified earlier, it will be added to the module automatically. To edit the newly added recipient's information consult the Editing a recipient 215 topic.

7.5.8 Renaming a recipient

This module allows a recipient to be renamed to another existing recipient and deletes the current recipient.
Before renaming a recipient, search for the correct recipient (see the topic Performing a search 20). Once the correct recipient is displayed, follow these steps :

1 Click on **Orders**->**Recipients** from the *Main window*.
2 Click on **Edit->Rename a recipient**
3 Select the name that should replace the current recipient's name and press **OK**.
4 A confirmation message appears : " Rename RECIPIENT1 to RECIPIENT2 ". Press *Yes* to confirm the change, *No* or *Cancel* to abort the operation.
5 If *Yes* was pressed, the change will be performed and the current record will be deleted if confirmed.

8 Appendix

8.1 List of related applications

This is a list of applications used with EDC to perform specific tasks.

CUSTWEB.EXE : This application runs at the record center, and allows a client to view/edit its inventory through the web.

DCLOCK32.EXE : This application is normally used when one needs to unlock locked sessions. A session is usually locked by the system when a computer crashes during an operation and the number of users has been exceeded when a new session is opened. Specific users (either at the record center or at a client's site) can have access to this program; to set up these users go in the Customer (for a client) or Management (for an employee) section -> User Group | Employee Group or Authorized user | Employee -> Edit -> Edit, add the "Access Management" module to their list of accessible modules.

Note: Often the session is not entirely locked, only one module cannot be accessed. In this case, one can unlock operations in the *System Information* module (see View and unlock locked operations 53).

DCSETP32.EXE: This application is used to run the DC.Cfg file (this is the configuration file that points out the starting directories of EDC Client).

DIMP32.EXE : This application is used when one needs to update the dictionary used by EDC (this is specifically for the fields and the menus of the software). The data of the dictionary is stored in String.dat (in the data directory).

EDCCLRPC.EXE: This is a server program that will be used with the upcoming EDC Client Web software.

EDCMONITOR.EXE: This application monitors the dispatcher program. It verifies if new changes were done in EDC and sends them to another program (specific to one of our clients).

EDCREP32.EXE : This application is used for the replication of data. It controls the start and end time of the different replication processes.

EDCREQIP.EXE : Only used on with EDC Client, this program is responsible for communicating and encrypting the data received. The program EDCREP32.EXE needs this program to do the replication between the RC and the customer.

EDCRPC.EXE : This process is the one used for the EDC Replication. If it is not installed, please refer to ***EDC Replication Installation and User Guide***. The replication settings must be properly configured in the *System Information* module.

EDCSER32.EXE : This application allows modem replication with the client server (this application is only useful when a modem is used).

EDCSERIP.EXE : This application communicates by IP over the network to send and receive files from a client server (this application is responsible for the replication with the client).

EDCSHL32.EXE : This application launches other EDC programs. Usually the launcher runs the following programs: IMGSER32.EXE, EDCREP32.EXE, EDCREQIP.EXE.

IMGSER32.EXE: This application is an image server, that is used for digital imaging.

LICENS32.EXE: This program allows installing the license for the software. Works with both RC and Client version. For example, if the client wants to increase their number of users, or move from the SA to SAI version of the software, the license we give them will be entered in this program.

REMO32.EXE: This is the main application that starts EDC Client.

THERMALPRINTSERVER.EXE: Program that allows configuring in DcSetp32.EXE a thermal printer that is installed on a specific machine identified by an IP address.

UPDATE.EXE: This application is used when updating the software.

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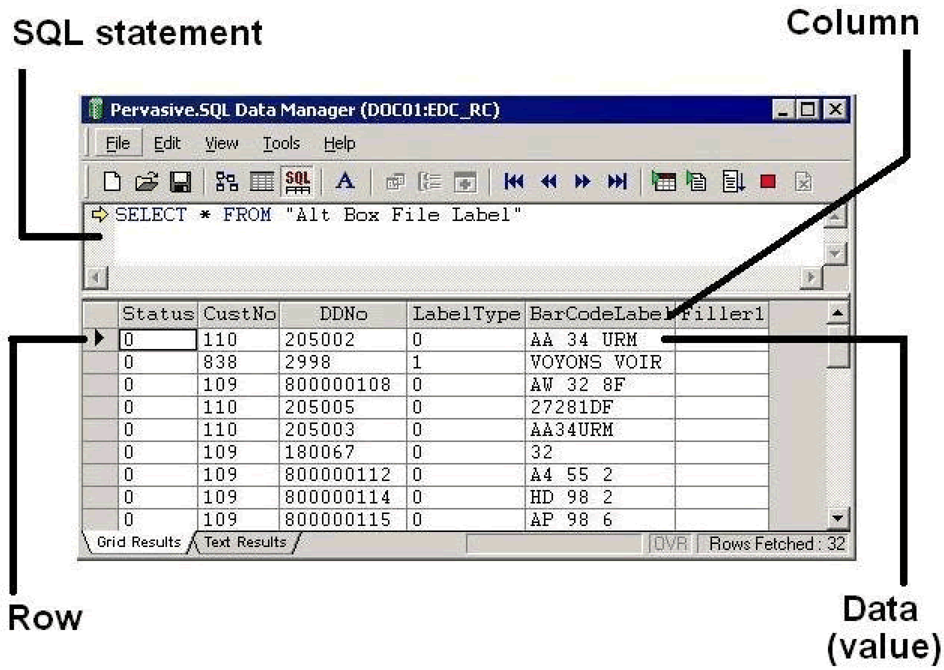
8.2 Tables

This topic deals with the major tables used by EDC. This will be useful especially if you start working with more advanced reports.

Definition

A table is the basic unit of storage in a database management system. It represents entities and relationships, and consists of one or more units of information (rows), each of which contains the same kinds of values (columns). Each column is given a column name, a datatype, and a width. The values found in the tables are the values found in the software.



Description

Access_Log

Module: Access Log
Description: This table keeps track of all the sessions opened in EDC (user, date and time, etc.)
Important Fields:

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
Site - Number given to a specific building
SessionNo - Automatic number given to each session opened in EDC
UserNo - EDC generated customer number, which can be see in the *Authorized User* module under the *System* field.
Active - Boolean FieldType (the values must be + or -) indicating if the session is active
StartDate - Date the session started
StartTime - Time the session started
EndDate - Date the session ended
EndTime - Time the session ended

Alt_Box_File_Label

Module: Box or File
Description: This table stores the alternate labels (bar codes) of boxes and files. Alternate labels can be viewed or modified in the Box or File modules by clicking on **View|Edit -> Alternate label**.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
DDNo - RC number of the box or file

LabelType - Box (0) and File (1)
BarCodeLabel - Alternate label

Box

Module: Box
Description: This table stores most of the information contained in the *Box* module.
Important Fields:

AccessLevel - Access level of the box
Activity - See the Activity Codes 228 topics
BoxDDNo - RC number of the box
BoxOwner - Owner of the box
CustBoxNo - Box number
Description - Description
DestDate - Destruction date
DestType - Destruction type (see the Activity Codes 228 topic)
DocTypeNo - Document type number given by the system
EndDate - End date
InVault - Boolean FieldType (the values must be + or -) specifying if the box is in the vault
Location - Box location
MainDeptNo - Department number given by the system
OldCustBoxNo - Old box number
RangeFrom - Range from field
RangeTo - Range to field
SourceLoc - Source location field
StartDate - Start Date
SubDeptNo - Sub-department number given by the system
UserField1 - Field 1
UserField2 - Field 2
UserField3 - Field 3
UserField4 - Field 4
UserField5 - Field 5
UserField6 - Field 6
WithdrawalDate - Withdrawal date

Box_History

Module: Box
Description: This table stores all the information viewable in the *Box* module, when pressing on **F3** or when clicking on **View -> History**.
Important Fields:

Activity - See the Activity codes 228 topic.
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DDNo - RC number of the box
HxDate - Date of the modification
HxTime - Time of the modification
Person - Name of the person that performed the modification or description of the modification.

Box_Memo

Module: Box
Description: This table stores the information viewable in the *Box* module, when pressing on **F4** or

when clicking on **View -> Notes**.
Important Fields:

ForeignID - In this case, this field corresponds to the BoxDDNo (RC number of the box)
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

Box_Memo_2

Module: Box
Description: This table stores the information viewable in the *Box* module, when clicking on **View -> Secondary Notes**.
Important Fields:

ForeignID - In this case, this field corresponds to the BoxDDNo (RC number of the box)
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

Customer

Module: Customer Information
Description: This table stores the information viewable in the *Customer Information* module.
Important Fields:

CustKey - Key assigned to each customer at their creation.
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.

Cust_Document_Memo

Module: Retention schedule
Description: This table stores the information viewable in the *Retention Schedule* module, when pressing on **F4** or when clicking on **View -> Notes**.
Important Fields:

ForeignID - In this case, this field corresponds to the DocTypeNo
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

Cust_Document_Type

Module: Retention Schedule
Description: This table stores all the information viewable in the *Retention Schedule* module.
Important Fields:

Active - Boolean FieldType (the values must be + or -) indicating if the document type is active
ActiveDisposal - See the Activity Codes 228 topic
ActiveRet - Active retention period (in months)

*AutoIndexBoxes - Boolean FieldType (the values must be + or -) indicating if the boxes will be indexed automatically
*AutoIndexFiles - Boolean FieldType (the values must be + or -) indicating if the files will be indexed automatically
*AutoIndexImages - Boolean FieldType (the values must be + or -) indicating if the images will be indexed automatically
Classified - Boolean FieldType (the values must be + or -) indicating if the document type is classified
Code - Document type code
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DocTypeNo - EDC generated number assigned to each document type
EnglishDesc - English description
FinancialEval - Financial Evaluation field
FrenchDesc - French Description
LegalEval - Legal Evaluation field
MainDeptNo - EDC generated number assigned to each department
OcrTemplateNo - EDC generated number assigned to each OCR template (these templates are only available when a customer is replicated with the Record Center).
SemiActiveDisposal - See the Activity Codes 228 topic
SemiActiveRet - Semi-active retention period (in months)
SubDeptNo - EDC generated number assigned to each sub-department

Cust_Source_Loc

Module: Source Location
Description: This table stores all the information viewable in the *Source Location* module.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
Location - Location name
AddrLine1 - First line of the location's address
AddrLine2 - Second line of the location's address
City - City
State - State
PostalCode - Postal Code
Country - Country
PhoneNo - Phone number

Customer_Space

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
LocationNo - EDC generated location number
Location - Location
Capacity - Capacity
Used - Number of spaces used
OutCount - Number of boxes out
LocationType - (1) File, (2) Box

Customer_User

Module: Authorized User

Description: This table stores all the information viewable in the *Authorized User* module.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
UserNo - EDC generated user number which can be seen in the current module under the *System* field.
FirstName - First name
LastName - Last name
MiddleInitial - Middle initial
PhoneNo - Phone number
Language - Default language (English = 0, French = 1)
ForcePassword - Boolean FieldType (the values must be + or -)
Active - Boolean FieldType (the values must be + or -)
Password expires - Boolean FieldType (the values must be + or -)
LastPasswordChange - Date entered by the system to keep track of the changes
ExpireAfterDays - Password expiration
ChangePassNextLogon - Boolean FieldType (the values must be + or -)
LoginName - Login name
EmailAddress - Email address
WorkingDirectory - Working directory
PhoneExt - Phone extension

Delivery_Address

Module: Delivery Address
Description: This table stores all the information viewable in the *Delivery Address* module.
Important Fields:

DelAddrNo - EDC generated number
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
AddrLine1 - First line of the address
AddrLine2 - Second line of the address
City - City
State - State or province
PostalCode - Postal code
Country - Country
ContactName - Name
ContactPhoneNo - Phone number
ContactFax - Fax
ContactPhoneExt - Phone extension
PercentSurcharge - Percent surcharge
Active - Boolean FieldType (the values must be + or -)
NoChargeRegDelivery - Boolean FieldType (the values must be + or -)
DailyReturn - Boolean FieldType (the values must be + or -)
DailyReturnQuty - Daily return quantity

Department

Module: Department
Description: This table stores most of the information viewable in the *Department* module.
Important Fields:

Coordinator - Coordinator
CoordinatorAddr - Address of the coordinator

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
Description - Department description
MainDeptName - Name
MainDeptNo - EDC generated department number
Supervisor - Supervisor
SupervisorAddr - Address of the supervisor

Document

Module: Document
Description: This table stores most of the information viewable in the *Document* module.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DocumentNo - EDC generated document number, which can be seen in the *Document* module under the *Document number* field.
FileDDNo - File RC number associated to the document, which can be seen in the *Document* module under the *File RC* field.
Description - Document description
CreationDate - Creation Date
Owner - Owner
MainDeptNo - EDC generated department number
SubDeptNo - EDC generated sub-department number

File

Module: File
Description: This table stores most of the information contained in the *File* module.
Important Fields:

AccessLevel - Access level of the file
Activity - See the Activity Codes 228 topics
BoxDDNo - RC number of the box
CustBoxNo - Box number
CustFileNo - File number
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
Description - Description
DestDate - Destruction date
DestType - Destruction type (see the Activity Codes 228 topic)
DocTypeNo - Document type number given by the system
EndDate - End date
EntryDate - Entry date
FileDDNo - RC number of the file
FileOwner - File owner
MainDeptNo - Department number given by the system
OldCustFileNo - Old file number
RangeFrom - Range from field
RangeTo - Range to field
ShelfLocationNo - EDC generated shelf location number, which can be seen in the *Shelf location* module under the *System* field.
SourceLoc - Source location
StartDate - Start Date

SubDeptNo - Sub-department number given by the system
UserField1 - Field 1
UserField2 - Field 2
UserField3 - Field 3
WithdrawalDate - Withdrawal date

File_History

Module: File
Description: This table stores all the information viewable in the *File* module, when pressing on **F3** or when clicking on **View -> History**.
Important Fields:

Activity - See the Activity codes 228 topic.
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DDNo - RC number of the file
HxDate - Date of the modification
HxTime - Time of the modification
Person - Name of the person that performed the modification or description of the modification.

File_Memo

Module: File
Description: This table stores the information viewable in the *File* module, when pressing on **F4** or when clicking on **View -> Notes**.
Important Fields:

ForeignID - Refers to FileDDNo
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

File_Memo_2

Module: File
Description: This table stores the information viewable in the *File* module, when pressing on **F4** or when clicking on **View -> Secondary Notes**.
Important Fields:

ForeignID - Refers to FileDDNo
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

Holiday

Module: Holiday
Description: This table stores all the information viewable in the *Holiday* module
Important Fields:

Description - Description given to the holiday

HolidayDate - Date of the holiday

In_House_Pick_Item

Module: Circulation
Description: This table stores the information viewable in the *Circulation* module, when going under File -> Pick lists
Important Fields:

PickListNo - EDC generated picking list number
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
ItemType - (0) Box, (1) File
DDNo - RC number of the item
Location - Location
Recipient - Recipient

In_House_Pick_List

Module: Circulation
Description: This table stores the information viewable in the *Circulation* module, when going under File -> Pick lists
Important Fields:

PickListNo - EDC generated picking list number
OperationDate - Date the creation of the picking list took place
OperationTime - Time the creation of the picking list took place
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
UserNo - EDC generated user number

In_House_Refile_Item

Module: Circulation
Description: This table stores the information viewable in the *Circulation* module, when going under File -> Refile lists
Important Fields:

RefileListNo - EDC generated refile list number
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
ItemType - (0) Box, (1) File
DDNo - RC number of the item
Location - Location

In_House_Refile_List

Module: Circulation
Description: This table stores the information viewable in the *Circulation* module, when going under File -> Refile lists
Important Fields:

RefileListNo - EDC generated refile list number

OperationDate - Date the creation of the refile list took place
OperationTime - Time the creation of the refile list took place
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
UserNo - EDC generated user number

List

Module: Disposal List, Transfer List, Deletion List
Description: This table stores some of the information viewable in the *Disposal List, Transfer List, Deletion List* module
Important Fields:

ListDDNo - EDC generated list number
Description - List description
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
UserNo - EDC generated authorized number
DestDate - Destruction date
ApprovedDate - Date the list was approved
ListType - See the Activity Codes 228 topic
DestType - See the Activity Codes 228 topic
CustListNo - List number viewable in the module
DeliveryNo - Number of the deliveries assigned to the list
OnPalletList - If the box is check off it means that the list has one or many pallets assigned to it.

List_Item

Module: Disposal List, Transfer List, Deletion List
Description: This table stores some of the information viewable in the *Disposal List, Transfer List, Deletion List* module
Important Fields:

ListDDNo - EDC generated list number
ItemType - See the Activity Codes 228 topic
DDNo - RC number of the item
CustItemNo - Customer number of the item
MainDept - Main department of the item
SubDept - Sub-department of the item
PickState - See the Activity Codes 228 topic
Volume - Volume of the item
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
DocTypeCode - Document type code viewable in the *Retention schedule* module under the *Type* field
Location - Location of the item

Orders_Request

Module: Order
Description: This table stores part of the information viewable in the *Order* module
Important Fields:

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
RequestNo - EDC generated request number
State - See the Activity codes 228 topic
RequestType - See the Activity codes 228 topic
UserNo - EDC generated user number, which can be seen in the *Authorized User* module under the *System* field.
DelAddrNo - EDC generated request number
RequestDelType - EDC generated delivery type number
DeliveryDate - Delivery Date
DeliveryTime - Delivery Time
Recipient - Recipient
BoxDDNo - RC number of the box
CustBoxNo - Box number
FileDDNo - RC number of the file
Quantity - Quantity
Description - Item description
RejectedReason - Reason the request was rejected
OrderNo - Order number
ItemNo - EDC generated item number which determines the position of the item on each order
RequestDate - Date the request was entered
RequestTime - Time the request was entered
PhoneNo - Phone number
LastName - Last name of the user
FirstName - First name of the user
ChargeCode - Charge back code used for biling purposes

Replication_Schedule

Module: No module is assigned to this table.
Description: This table stores the information viewable in the application called EDCREP32.exe
Important Fields:

Operation - See the Activity codes 228 topic
LastDate - Last date the replication was active for this operation
LastTime - Last time the replication was active for this operation
StartTime - Scheduled start time
EndTime - Scheduled end time
Interval - Interval

Sub_department

Module: Department
Description: This table stores the information viewable in the *Department* module, when one edits or adds a sub-department.
Important Fields:

SubDeptNo - EDC generated sub-department number
CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
MainDeptName - Main department name
SubDeptName - Sub-department name
RetentionYears - Retention years
MainDeptNo - EDC generated department number
Active - If the box is checked, then the sub-department is active

Description - Description

System_Info

User_Group

<u>Module:</u> User Group
<u>Description:</u> This table stores part of the information viewable in the *User Group* module
<u>Important Fields:</u>

CustNo - EDC generated customer number, which can be seen in the *Customer Information* module under the *System* field.
GroupNo - EDC generated group number
Name - Group name

Note: When the values are of the boolean type, "+" means *Yes* and "-" means *No*.

8.3 Activity codes

Order_Request

<u>State</u>

Accepted = 2
Rejected = 3

<u>Request_type</u>

Box retrieval = 1
File retrieval = 2
= 3
Box sale = 4
Box returns = 5

Replication_Schedule

<u>Operation</u>

Replication Client to Rec. Center = 1
Replication Rec. Center to Client = 2
Send document types = 3
Non track file update = 4
Delivery addresses update = 5
Send tape schedule = 6
Update lists = 7
Image replication client to rec. center = 8
Image replication rec. center to client = 9
Delivery update = 10

8.4 Defining a mask

When a field has a mask, some information must be entered according to the criteria defined by the mask. Most masks are defined in the Customer Information module 54.

Mask criteria

Regular mask

- "X" any character
- "!" any character, forced to upper case
- "L" any character, forced to lower case
- "x" any character, first letter of a word forced to upper case
- "a" alphas and "-" and "," and "."
- "A" alphas and "-" and "," and ".", forced to upper case
- "l" alphas and "-" and "," and ".", forced to lower case
- "1" numbers only, no spaces
- "9" numbers and spaces only
- "i" numbers and spaces and "-"
- "#" numbers and spaces and "-" and "."

Example: A field with the mask "999" will accept the following values (of three characters): "345", " 84" and "0 0". It will not accept the following values: "4-6", "4.6", "4,6", "ert", "er4" and "E-4"

Date mask

Value	Result
"mm/dd/yyyy"	"01/09/1998"
"yyyy/mm/dd"	"1998/01/09"

9 Glossary

9.1 Definitions

Access level

The access level is used to prevent unauthorized users from editing or ordering boxes or files with a restricted access. When editing the field, the user can only assign a value less than or equal to his own level. If the access level of a user is less than the box or file access level, the user is not allowed to edit or order it.

Bar code

Series of printed vertical bars arranged in a pattern that represents meaningful characters, which may be read by an automated reader. The off-site record center identifies every box and file with a bar code label to ensure accuracy when files and boxes are entering and leaving the off-site center.

Cache size

Number of images that can be archived in-house.

Company key
Series of numbers and letters which identify an organization. Associated with the company key is a company password which must be kept confidential within the organization to ensure the confidentiality of informations. See also Password.

Conservation policy
Determines if the box and file disposal dates are calculated from their related department or document type. The most common policy is to compute disposal dates from the document type.

Deletion list (cancellation of space)
List of semi-active boxes and files which are to be deleted (effectively cancelling the space for billing purposes) from the system.

Delivery types
The different delivery periods that are offered by the off-site record center.

Destruction list
List of boxes including all documents with an expired disposal date. The destruction of the items present on the list must be confirmed before the operation can be executed. The disposal mode of the document's type will establish in what manner the boxes will be destroyed.

Disposal
Action that will be applied to a document at the end of its life. The disposal modes are managed by the document types.

Disposal, CONFIDENTIAL
Documents of this mode will be destroyed in a confidential manner.

Disposal, mode of
Manner in which a document will be disposed of. The disposal modes are controlled by the document types.

Disposal, NON CONFIDENTIAL
Documents of this mode will not be destroyed in a confidential way.

Disposal, NONE
A disposal mode has not yet being determined for documents.

Disposal, PERMANENT
Documents of this mode will never be destroyed.

Disposal, REVISION
Documents of this mode will be placed on a list so that they can go through a special verification before being destroyed.

Disposal, SAMPLE
Documents of this mode will be placed on a list so that you can extract samples and destroy the remaining items.

Disposal, SEND TO DEPOT
Two possible situations :

1. The active documents of this mode will be transformed into semi-active documents and sent

to the storage facility.

2. Semi-active documents of this mode will generally be sent to the permanent archiving facility.

Document, active

This is a document that is either still in progress or that is being accessed frequently. Active documents are generally stored within an organization's storage facility, not at an off-site records center.

Document, semi-active

A document that is no longer in progress and is not being accessed frequently. Hence, it is cost efficient to store semi-active documents at an off-site records center.

Field

Reserved zone of an entry form that can contain a specific information such as an entry date or a box description.

Field, alphanumeric and numeric

The most common. Simply type the required information in the field. A numeric field can contain only numbers, while an alphanumeric field can contain both numbers and letters.

Field, choice field

Only a limited set of choices may be entered in the field. Press the space bar or click on the choice button to the right of the field to select the next possible value.

Field, drop down

This field is like numeric and alphanumeric field, but only values located on a list can be entered in the field. A pop-up list of the valid values is accessible by clicking on the drop-down button located to the right of the field.

Field, optional

Field that can remain empty.

Field, required

Field on an entry form which must not be left blank. An entry form can only be confirmed if all required fields are completed.

Field, unique

Field on an entry form which cannot have duplicate values. For example, the box number is a unique field, so it is not possible to enter a new box having the same number as a box currently in the inventory.

History

History of the activities of a box or file.

Index

Fields by which a list or report will be sorted, scanned or searched.

Mask

When a field has a mask, the information must be entered according to the criteria defined by the mask. Most masks are defined in the Customer Information module.

Mask criteria

Regular mask

- "X" any character
- "!" any character, forced to upper case
- "L" any character, forced to lower case
- "x" any character, first letter of a word forced to upper case
- "a" alphas and "-" and "," and "."
- "A" alphas and "-" and "," and ".", forced to upper case
- "l" alphas and "-" and "," and ".", forced to lower case
- "1" numbers only, no spaces
- "9" numbers and spaces only
- "i" numbers and spaces and "-"
- "#" numbers and spaces and "-" and "."

Example : A field with the mask "999" will accept the following values (of three characters): "345", " 84" and "0 0". It will not accept the following values: "4-6", "4.6", "4,6", "ert", "er4" and "E-4"

Date mask

Value	Result
"mm/dd/yyyy"	"01/09/1998"
"yyyy/mm/dd"	"1998/01/09"

Menu

List of words, generally located on the top of the screen, that gives access to menu items. A menu item may either execute an operation or open another menu, called a sub-menu.

Menu item

Choice of operations offered within a menu. The menu item may either execute an operation, or open a new sub-menu with its own menu items. See also menu.

Module

EDC is composed of multiple modules accessible from the Main Window of the system. Each module is responsible for a specific set of operations. For example, the Box module is used to add, edit, print, and search for boxes.

Non-track file

These are files that have not been inventoried on the computer system. They may still be ordered as non-track files, but the system will record only the description of the file when it is ordered. Therefore the tracking on non-track files is limited, but it is still possible to order at a file level.

Online help

Information on the software that is available within the software itself. Pressing F1 will display a help screen on the current operation in a module.

Password

Combination of letters, numbers, or other characters used to confirm the identity of a company or user. Passwords must be kept secret at all times to ensure confidentiality. It is also recommended to change passwords on a regular basis.

RC number

RC is shorthand for Record Center. Every box and file is identified with a unique numerical RC number. This number is used with bar code labels to ensure accuracy when the boxes and files

are manipulated internally by the system.

Reactivation

A semi-active document can be removed from the record center by deleting it. The information of the document in question is not erased from the database, it is only mark as deleted. A previously deleted document can be returned to the record center by reactivating it, doing this will also reactivate its past history.

Recipient

Person to whom an order is addressed. The authorized user is different from the recipient in that he is the one having access to EDC and can order for several recipients.

Record

All fields of a specific item such as, for example, the information of box "231".

Record center, off-site

Storage facility where less active (semi-active) documents are stored. Such a record center allows to preserve the office space for more frequently used documents.

Replication

When the organization is linked with an off-site record center, a database of the documents is maintained within the organization and the off-site record center in order to provide an efficient management of documents. Replication is the daily synchronization of the two databases.

Restrictions

Conditions that prevent the disposal of documents containing the restriction. Restrictions are associated to document types and are used to ensure the conservation of certain documents beyond their normal retention period.

Retention period

Period for which documents must be stored for either legal, fiscal or company policy reasons.

Retention schedule

Collection of document types controlling the disposal of boxes and files. Types define the retention period and the disposal mode of documents.

Retention, active

Retention period of a document within an organization's storage facility. This period is defined from the time a document is closed to the time the document is transferred to semi-active storage at an off-site center.

Retention, semi-active

Retention period of a document within an off-site record center. This period is defined from the time a document enters an off-site record center to the time the document is disposed of. See also conservation policy.

Session, suspended

After a computer failure, an active session at that time will remain active even if it is not anymore. Any suspended session should be terminated after making sure that the session is really inactive. When all the user licenses are used up by suspended sessions (preventing from having access to EDC), the Access Management program can be used to terminate all suspended sessions.

Shortcut, keyboard

Combination of one or more keys on the computer keyboard to be pressed simultaneously. Also

known as hot keys, they enable to perform operations more efficiently without having to use the menu or the mouse.

Signing officer

Person with the authority to approve the destruction lists.

Sorting

When viewing a listing indexed by box numbers, the numbers will be sorted like a dictionary. Here is a sample list of sorted box numbers: 00001, 00002, 03, 09, 10, 100, 11, 20, 9, A-001, B-002, a-001, b-001. It is important to note that the box number 100 is before the number 11 and that all uppercase letters appear before lowercase letters. If your box numbering system is strictly numerical, then it is important to left pad with "0"s your numbers like 000001, 000002, 000022, ...

State, DELETED

The item has been deleted (which implies that the space for the item is cancelled, and will not be billed for). Boxes are generally deleted because they will not be returning to the off-site record center.

Note that deleted semi-active items are not deleted from the computer system; they are only marked as "DELETED", it is therefore possible to recover the history of deleted items by reactivating them.

State, DESTROYED

The item has been destroyed.

State, DESTROYED (IN-HOUSE)

The item has been destroyed in-house.

State, IN

The item is at the record center and is available for ordering.

State, IN (IN-HOUSE)

The item is present within the in-house inventory (active documents) and is available for ordering.

State, ON DELETION

The item is on a deletion (cancellation of space) list. After the item is processed, its state will change to "DELETED".

State, ON DESTRUCTION

The item is on a destruction list at the record center. After destruction of the item, its state will change to "DESTROYED".

State, ON TRANSFER

The item is on a transfer list. After the transfer, its state will change to "TRANSFERRED".

State, OUT

The item has been ordered from the record center and has not been returned.

State, OUT (IN-HOUSE)

The item has been checked out of the in-house inventory (active documents) and has not been returned.

State, IN TRANSIT

The item has been entered in the computer's inventory, but the item has not been received at the

off-site record center. The rent charges for items in IN TRANSIT are not billed. Once the items arrive at the off-site record center, their state is changed to "IN", and rent charges begin to take effect.

State, PRINTED

These items only exists "virtually". An RC number is only generated in the inventory, as when entering a new item in IN TRANSIT, but the file does not exist. This RC number can be later recovered to create an existing file. Then the item is edited to enter a number, a description or any other appropriate information. Its state will be IN or IN (IN-HOUSE), depending if it is added to the semi-active or active inventory.

State, SELECTED

The item is currently selected for an order, but has not yet been shipped.

State, TRANSFERED

The item has been transferred to another storage center.

Transfer list

List of boxes which are to be transferred from an off-site record center to another location.

Underlined

Mark a graphic element or a part of a text by an increased luminosity.